



# **BUSINESS, ECONOMY AND SOCIETY: ISSUES FOR RESEARCH**

## in a Knowledge and Information Society

**Coordinators: Irene García Medina and Marta Martín Llaguno**

Authors: Lindsey Carey, Julie McColl, Irene García Medina, Zuzanna Cejmer, Nilay Balkan, Giancarlo Fedeli, Noor Sabaruddin, Vicente García Escrivá, Ricardo Sellers-Rubio, Felipe Ruiz Moreno, Leonor Alberola Amores, Susana Miquel-Segarra

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Prologue: Zahaira Fabiola González Romo

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## **PREFACE (EN)**

It is a pleasure to present this compilation of academic articles that form this book with the title: “Business, Economy and Society: Issues for Research in a Knowledge and Information Society”.

This book is the result of a project financed by Banco Santander in which European Universities (Glasgow Caledonian University in Scotland and Universidad de Alicante in Spain) have worked together in order to offer Doctorate students and their supervisors the opportunity to learn from one another.

Presentations, practical exercises, cultural visits and talks about methods, results and motivation of academic investigation took place between 8th and 12th of June 2015 in Alicante and between 11th and 15th January 2016 in Glasgow in order that:

Examples of best practice in research were shared, problems that commonly appear during the study of a doctorate were resolved and a process was introduced to facilitate the exchange of experiences and the mutual collaboration between researchers in both Universities.

This compilation of articles shows the research abilities of the participants and forms an example of the dissemination of knowledge.

Enjoy.

*Dr. Irene García Medina, Glasgow Caledonian University*

*Dr. Marta Martín Llaguno, Universidad de Alicante*

*Project Coordinators.*

## **PREFACIO (ES)**

Es con gran placer que les presentamos esta recopilación de artículos académicos que configuran el libro que lleva por título “Business, Economy and Society: Issues for Research in a Knowledge and Information Society”.

Este libro es el resultado de un proyecto financiado por el Banco Santander mediante el cual dos universidades europeas, la Glasgow Caledonian University en Escocia y la Universidad de Alicante en España se juntan para ofrecer a sus estudiantes de doctorado y a sus supervisores la oportunidad de aprender los unos de los otros.

Del 8 al 12 de junio del 2015 en Alicante y del 11 al 15 de enero del 2016 en Glasgow se realizaron unas jornadas donde hubo ponencias, trabajos prácticos, visitas culturales y sobre todo se habló mucho de investigación, de cómo se investiga, de qué manera, con qué resultados, para qué.

Se puso a disposición de unos y de otros ejemplos de buenas prácticas, se trató de resolver los problemas que aparecen cuando uno está realizando un doctorado y se constituyó una base para el intercambio de experiencias y la colaboración mutua entre investigadores de ambas universidades.

Esta recopilación de artículos muestra el afán investigador de los participantes y constituye un ejemplo de diseminación del conocimiento.

Disfruten.

*Dr. Irene García Medina, Glasgow Caledonian University*

*Dr. Marta Martín Llaguno, Universidad de Alicante*

*Coordinadoras del proyecto.*

## PROLOGUE (EN)

This book offers an overview of research from the point of view of heterogeneous disciplines, which allows the reader to form an objective and comprehensive analysis of multiple economic and social aspects that are currently being investigated from an academic point of view. Our society as a whole is affected by the way we work, live and interact, health, culture, new paradigms that support an economy based on mobility and a myriad of approaches that redefine the new era.

This book is the result of a multidisciplinary thinking toward understanding the implications of social and economic communications that are occurring every day in very different areas. The authors are experts from Scottish and Spanish universities which open a window to this world of knowledge in which the rapidity of technological change does not always coincide with our ability to assimilate them, but in which nevertheless we must continue taking the decisions that transform our society.

In the chapter *Achieving Impact in Academic Research Within the context of the funding landscape in the UK*, the author explains the importance impact of research for the society and how it has become an important priority for the government. This impact also demonstrates the value added in terms of social and economic impact for all the stakeholders who have an interest or that are affected by research, including the general public. So it is vitally important for all academic researchers to understand the landscape of the financing institutions in the UK, in order to conceive a plan for evaluation, monitoring and measuring the impact on the entire life of the project.

The chapter *Mindfulness research in higher education: student perspectives, educator perspectives and the research gap* considers the benefits of care in higher education from the perspective of the student and the teacher. The author conducts an analysis of the literature on the subject and identifies gaps in existing large-scale empirical research, concluding that multi -site studies are needed in order to help to advance policies in this area.

In the chapter *Awareness and acceptance of Mobile Marketing*, the popularity of mobile phones, especially smartphones is analyzed and the best strategies for successful mobile marketing strategies. The author defines this medium as relatively new in the world of marketing and emphasizes that although there is a great opportunity for development there are still many challenges related to consumer attitudes that need to be understood and managed effectively to ensure future success. In this chapter, the effectiveness of various methods of mobile marketing are described.

This study shows the best mobile marketing strategies and presents innovative ways to promote long-term and brand awareness commitment through the active participation of consumers in order to raise awareness brand and participation through gamification.

In the chapter *A critical examination of the use of digital media channels in developing customer relationships within Third Sector organisations*, the author investigates how charities (brands) are using digital media channels in the development of relations with donors (consumers) in order to increase donations. The use of social networks within the third sector is also discussed, which compromises voluntary organizations, charities, community groups and social enterprises, which are independent from government and driven by the need to "achieve social objectives" such as public improvement, the environment or economic welfare (National Audit Office). The researcher wants to compare a charity in the UK and one in US in order to broaden the current literature and

contribute to the knowledge of the charities, digital marketing strategies and using of social media, trying to build a framework of best practices in the acquisition of new donors and strengthening the relationship between brands and digital consumers.

In the chapter *Can social media be an effective tool for creating loyalty and community amongst micro firm cafes?* The author considers that one of the biggest gaps regarding social media is how they can be used to reach and support the objectives and marketing strategies of micro companies. It stresses that it is imperative that this gap is understood as technological innovations have changed consumer behavior; customers are spending more time online and on social media platforms, and digital and physical world are increasingly interconnected. For the author, the vision and the knowledge gained from the anthropological perspective can be used to develop marketing strategies that mimic the patterns of similar behavior shown in group membership and group loyalty to help gaining loyalty for a company.

The next chapter *The role and potential of ICTs in the tourism industry: the visitor attractions sector*, is a study about how information technology developed in the 1990s is being adopted and changing people's life and how is being applied in the tourism sector. With the increasing integration of this new technology in travel and tourism, deeply connected to information, mobility and human experience, the industry has undergone tremendous transformation. The author notes that recent research related to the use of information and communications technology (ICT) in the tourism industry suggests that the industry attracting visitors lags behind other sectors of tourism, such as companies' airlines and tour operators. The observation and the implications of this phenomenon are the main body of this essay.

In the chapter '*Luxury Malaysia*' Campaign: an initiative by the Malaysian Government in turning Malaysia into a luxury retail destination, the campaign "Luxury Malaysia", a campaign that was created by the Malaysian government is analyzed. This campaign is parts of its Economic Transformation Plan (ETP). One component of the campaign is known as 'affordable luxury', which focuses on luxury stores and make Malaysia a favorite retail luxury destination. The campaign has successfully attracted many foreigners to the country and indirectly strengthened its economic growth. It could be concluded that the initiative established by the Malaysian government has been both proactive and systematic.

In this book, other aspects related to recreation are also addressed in the chapter *The Global Film Industry*, where the author discusses the film industry considering it as an entity that has great relevance worldwide. Hollywood in this sector remains one of the most dominant in the market of world cinema producers, since their products are perceived as a worldwide standard. The author states that in recent years there have been significant changes in international film markets, with a growing importance of Asian markets, especially the Chinese market. This change has been an opportunity for Hollywood. However, threats to the hegemony of Hollywood come from a disruptive technological innovation: Internet and piracy. For the author, we can see that Hollywood has adapted its business model (again) by introducing changes in the form and content of their products.

One factor also addressed in this book has to do with business and sustainability, which is why in the chapter *Is any space in the market for sustainable wines?* The author analyzes one of the main challenges facing the wine industry in recent years: sustainability. The author proposes that from the point of view of marketing, sustainability can be considered as a way to differentiate the wines to meet the specific

demands of certain market segments. However he believes that this strategy may also be considered necessary to ensure the future development of the wine sector as a whole. To this end, the author has designed a study using the method of contingent valuation to estimate the willingness to pay for sustainable wines by Spanish consumers of wine. The results show that most consumers are willing to pay a premium price for this type of wine and that there are significant differences between different market segments.

In the chapter *Measuring competition using the approach of the New Empirical Industrial Organization*, the author believes that the identification of competitors is crucial for any director of marketing because it allows describing the competitive moves of the main rivals operating in the same market. This chapter examines the evolution of the different streams of research that have attempted to measure the rivalry in recent decades in the field of marketing. Specifically, this chapter focuses on the approach of the New Empirical Industrial Organization and presents a brief review of the empirical models used under this line. These models have clearly contributed to the development of theoretical and empirical study of competitive behavior patterns that occur between firms in an industry and, thus, have facilitated the decision-making of the managers.

Regarding health, in the chapter *Agenda, Journalism and Politics in epidemic crisis of Ebola*, the evolution of the disease Ebola virus is analyzed as an occupational disease whose transmission was the focus of the public discourse in Spain and the United States. To meet this objective, the objects of the study will be the discursive political space, media, and social networks, because it is commonly recognized its importance in the social construction of priority issues for contemporary societies.

Finally, during the development of the chapter *Analysis of professional corporate communications from the associations in Spain*, the author concluded that while the professional profile in the field of corporate communication has been analyzed by fixed five-year intervals ( DIRCOM ), the aspects focused on business - consulting studied by ADECEC relationship have been more discontinuous in time and ceased publication in 2008. The data also show that there is no homogeneous profile figure in dircom and that there is a relevant lack of unanimity in the name of those responsible for corporate communication. Increasingly different nicknames are set to refer to the same position.

All chapters of this book have an ambitious approach and constitute an invaluable research to contribute to share knowledge in our challenging and increasingly demanding society.

***Dr. Zahaira Fabiola González Romo***

***Universidad Internacional de Cataluña***

## PROLOGO (ES)

El presente libro nos ofrece un panorama de investigaciones desde el punto de vista de disciplinas muy heterogéneas, lo cual permite al lector formarse un análisis objetivo y global sobre múltiples aspectos tanto económicos como sociales que están siendo actualmente investigados desde un punto de vista académico. Nuestra sociedad en su conjunto se ve afectada por la forma en la que trabajamos, vivimos y nos relacionamos, la salud, la cultura, los nuevos paradigmas que sustentan una economía basada en la movilidad y un sinfín de planteamientos que redefinen esta nueva era.

Este documento es el resultado de maduraciones sucesivas hacia la comprensión de las implicaciones que las comunicaciones sociales y económicas que se están produciendo cada día en muy diversas áreas. Son expertos doctores de universidades Escocesas y Españolas los que nos abren una ventana a este mundo en que la rapidez de las transformaciones tecnológicas no siempre coincide con nuestra capacidad de asimilación, pero en el que sin embargo las decisiones que transforman nuestra sociedad debemos seguir afrontándolas cada día.

En el capítulo *El Impacto en la investigación académica dentro del contexto del panorama de la financiación en el Reino Unido* se afronta el impacto de la investigación y como ésta se ha convertido en una prioridad importante para el gobierno, dicho impacto también demuestra el valor añadido en términos de efecto social y económico para todos los actores que tienen un interés o que se ven afectadas por la investigación, incluido el público en general, por tanto es de vital importancia para todos los investigadores académicos entender el panorama de la financiación de instituciones del Reino Unido, con tal de planificar conscientemente para la evaluación, el seguimiento y la medición del impacto en toda la vida del proyecto.

En el capítulo Investigación sobre “*Mindfulness*”en el sector de la Educación Superior: perspectivas desde el punto de vista de los estudiantes, de los educadores y la brecha en el mundo de la investigación, se consideran los beneficios de la atención en la educación superior tanto desde la perspectiva del estudiante y el educador. El autor lleva a cabo un análisis de la literatura al respecto e identifica lagunas en la investigación empírica existente en gran escala, llega a la conclusión de que se necesitan estudios multi-site para ayudar al progreso de políticas en esta área.

En el capítulo *La conciencia y aceptación de Marketing Móvil* se analiza la gran popularidad de los teléfonos móviles, especialmente teléfonos inteligentes hecho que hace evidente, aunque no garantiza el éxito de las estrategias de marketing móvil. El autor define este medio como relativamente nuevo en el mundo del marketing y enfatiza que aunque existe una gran oportunidad de desarrollo todavía hay muchos desafíos relacionados con la actitud de los consumidores que necesitan ser comprendidos y administrados de manera eficaz para asegurar el éxito futuro. En este capítulo, se describen los diversos métodos de marketing móvil para mostrar cómo el consumidor se dirige así como un detalle de la eficacia de cada método.

Dicho estudio permite al autor ver que las mejores estrategias de marketing móvil están presentando formas innovadoras para impulsar el compromiso a largo plazo y el conocimiento de la marca a través de la participación activa de los consumidores con el

fin de aumentar las conversiones o elevar la conciencia de marca y la participación a través de gamification.

En el capítulo *Un examen crítico de la utilización de los canales de medios digitales en el desarrollo de relaciones con los clientes dentro de las organizaciones del Tercer Sector*, el autor intenta investigar cómo las organizaciones benéficas (marcas) están utilizando los canales de medios digitales en el desarrollo de las relaciones con los donantes (consumidores) con el fin de aumentar las donaciones. También se analiza el uso de las redes sociales dentro del tercer sector, lo que compromete las organizaciones de voluntarios, organizaciones benéficas, grupos comunitarios y empresas sociales, que son gobierno independiente e impulsado por la necesidad de "lograr los objetivos sociales", tales como la mejora pública, el medio ambiente o económico bienestar (National Audit Office). La investigación desea comparar una organización benéfica del Reino Unido y uno de los EE.UU con el fin de ampliar la literatura actual y contribuir al conocimiento de las organizaciones de caridad, sus estrategias de marketing digital y el uso de los medios sociales, buscando como fin último un marco de mejores prácticas en cuanto a la adquisición de nuevos donantes y el fortalecimiento de la relación entre las marcas y los consumidores digitales.

En el capítulo *Medios de comunicación social puede ser una herramienta eficaz para la creación de la lealtad y la comunidad entre cafés micro empresa?* El autor considera que una de las mayores brechas con respecto a los medios sociales es la forma en que se pueden utilizar para alcanzar y apoyar los objetivos y estrategias de marketing. Destaca que es imperativo que esta brecha se entienda dado que las innovaciones tecnológicas han cambiado el comportamiento del consumidor; los clientes están gastando cada vez más tiempo en línea y en las plataformas de medios sociales, y el mundo digital y físico están cada vez más interconectados. Para el autor, la visión y el conocimiento obtenido a partir de la perspectiva antropológica puede ser utilizado para desarrollar estrategias de marketing que imiten los patrones de comportamiento similares mostrados en la pertenencia a un grupo y la lealtad de grupo para ayudar a fomentar la lealtad a una empresa.

En el capítulo *El papel y el potencial de las TIC en la industria del turismo: el sector de atracciones para los visitantes* se hace una investigación sobre el advenimiento de las tecnologías de la información en la década de 1990, y los respectivos avances en el campo del turismo, sector en el que cada vez más se avanza y que han llegado a revolucionar la vida de las personas. Con la creciente integración de este avance tecnológico en los viajes y el turismo, profundamente conectados a la información, la movilidad y la experiencia humana, la industria ha experimentado una enorme transformación. El autor señala que la investigación reciente relacionada con el uso de tecnologías de la información y la comunicación (TIC) en la industria del turismo sugiere que el sector de la atracción de visitantes va a la zaga de otros sectores del turismo, tales como las compañías aéreas y los operadores turísticos. La observación y las implicaciones de este fenómeno constituyen el cuerpo principal de este ensayo.

Durante el desarrollo del capítulo *Campaña Lujo de Malasia: una iniciativa del Gobierno de Malasia en convertir a Malasia en un destino de lujo al por menor*, se analiza precisamente la campaña 'Lujo Malasia', una campaña que fue creada por el gobierno de Malasia como parte de su Plan de Transformación Económica (ETP). Uno de los componentes de dicha campaña es el conocido como 'lujo asequible', que se centra en las tiendas de lujo y en hacer de Malasia un destino preferido para la venta al

por menor de lujo. La campaña ha atraído con éxito a numerosos extranjeros al país e indirectamente ha fortalecido su crecimiento económico. Se podría concluir que las iniciativas establecidas por el gobierno de Malasia han sido a la vez proactivas y sistemáticas.

En este libro también se abordan otros aspectos relativos al esparcimiento, en el capítulo *La Industria de Cine Global*, el autor aborda la industria del cine considerándola aún como un ente que aún conserva una gran relevancia a nivel mundial. En este sector Hollywood sigue siendo uno de los productores más dominantes en el mercado del cine mundial, ya que sus productos son percibidos como un estándar en todo el mundo. El autor afirma que en los últimos años se han producido cambios significativos en los mercados internacionales de cine, con una creciente importancia de los mercados asiáticos y, sobre todo, del mercado chino. Este cambio ha sido una oportunidad para Hollywood. Sin embargo, las amenazas a la hegemonía de Hollywood vienen de una innovación tecnológica disruptiva: Internet y la llamada piratería en Internet. Para el autor, es posible observar que Hollywood ha adaptado su modelo de negocio (una vez más) mediante la introducción de cambios en la forma y el contenido de sus productos.

Un factor también abordado en este libro tiene que ver con los negocios y la sostenibilidad, es por ello que en el capítulo *¿Tienen cabida en el mercado los vinos sostenibles?* El autor analiza uno de los principales desafíos a los que se enfrenta el sector vinícola en los últimos años: la sostenibilidad. El autor propone que desde el punto de vista del marketing, la sostenibilidad puede ser considerada como una forma de diferenciar los vinos para satisfacer la demanda específica de determinados segmentos de mercado. Sin embargo cree que esta estrategia también puede ser considerada como necesaria para garantizar el futuro desarrollo del sector vitivinícola en su conjunto. A tal efecto, el autor ha diseñado un estudio que emplea el método de la valoración contingente para estimar la predisposición a pagar por los vinos sostenibles por parte de los consumidores españoles de vino. Los resultados revelan que la mayoría de consumidores están dispuestos a pagar una prima de precio por este tipo de vino y que existen importantes diferencias entre los diferentes segmentos de mercado.

En el capítulo *Cómo medir la competencia usando el enfoque de la Nueva Organización Industrial Empírica*, el autor cree que la identificación de los competidores es crucial para cualquier director de marketing ya que permite describir los movimientos competitivos de los principales rivales que operan en su mismo mercado. Este capítulo examina la evolución de las diferentes corrientes de investigación que han tratado de medir la rivalidad durante las últimas décadas en el campo del marketing. En concreto, este capítulo se centra en el enfoque de la Nueva Organización Industrial Empírica y expone una breve revisión de los modelos empíricos utilizados bajo esta línea. Estos modelos han contribuido claramente al desarrollo teórico y empírico del estudio de los patrones de comportamiento competitivo que se dan entre las empresas de una industria y, de esta forma, han facilitado la toma de decisiones de los gestores de las mismas.

Tampoco se dejan de lado aspectos relacionados con la salud, pues en su capítulo *Agenda Periodística y Política en crisis epidémicas: el Ébola*, se analiza la evolución de la enfermedad del virus ébola, como enfermedad profesional cuyo contagio se realizó fuera de foco en el espacio discursivo público en España y Estados Unidos. Para dar respuesta a este objetivo, los objetos de estudio durante el desarrollo de este capítulo van a ser el espacio discursivo político, el mediático, y las redes sociales, puesto que es

comúnmente reconocida su importancia en la construcción social de los temas considerados prioritarios por las sociedades contemporáneas.

Por último, durante el desarrollo del capítulo *Análisis de los profesionales de la comunicación corporativa desde el asociacionismo en España* se llega a la conclusión que mientras que el perfil del profesional del ámbito de la comunicación corporativa, en su sentido más general, se ha analizado con una periodicidad fija quinquenal (DIRCOM), los aspectos centrados en la relación empresa-consultoras estudiados por ADECEC han sido más discontinuos en el tiempo y dejaron de publicarse en 2008. Los datos muestran además, que no existe un perfil homogéneo de la figura del dircom y que es relevante la falta de unanimidad en la denominación de los responsables de la comunicación corporativa. Cada vez se recogen más apelativos diferentes para hacer referencia a un mismo puesto.

Todos los capítulos que conforman este libro tienen un criterio ambicioso y de base suficientemente amplia para hacer realidad nuevas oportunidades de negocio, nuevas formas de hacer política, de experimentar la cultura, de vivir y comunicar el turismo, la salud, etc. constituyen el desafío y la promesa de la investigación en una sociedad cada vez más exigente.

***Dr. Zahaira Fabiola González Romo***

***Universidad Internacional de Cataluña***

# CHAPTER 1

## Achieving Impact in Academic Research Within the context of the funding landscape in the UK

Dr Lindsey Carey, Glasgow Caledonian University

### Why bother?

The UK government, where much research funding emanates from, is putting and increasing amount of emphasis on the palpable and demonstrable impact that the research it is funding is able to demonstrate.

Research impact has become an important priority for the government which has cascaded down into the governmental led funding bodies and ultimately into all funding bodies and grounds root research in all disciplines. Impact in research also demonstrates added value in terms of societal and economic effect for all stakeholders who have an interest or who are affected by research, including the general public. A defined and explicit route to impact is now usually required in all research proposals and funding bids as a condition of funding. The Research Council UK (RCUK) which provides the strategic leadership and direction for the seven governmental funded research councils in the UK provides detailed definitions, case studies and directions as to the method of achieving impact in research, in addition to the ‘pathways to impact’ guidance sections within the websites of the research councils themselves (see the Engineering and Physical Sciences Research Council (EPSRC) at <https://www.epsrc.ac.uk/funding/howtoapply/preparing/impactguidance/> for an example). Most research councils also make it explicit within their guidelines that the research proposals will be returned, even if they have achieved the required standard through the relevant pointage system if their impact strategy is not clearly defined, adequate and cognizant of relevant stakeholders. Ultimately, achieving impact in research ensures that there will be a continued investment in academic research in the UK.

The benefits for UK society and the economy of positive impact being included as a metric within the decisions made by funding bodies as to which research should be given support are wide ranging as they cut across many disciplines . The RCUK defines them as “knowledge exchange, new products and processes, new companies and job creation, skills development, increasing the effectiveness of public services and policy, enhancing quality of life and health, international development and so on<sup>1</sup>” but they can vary according to the discipline specific characteristics.

The benefits of the impact agenda also stretch to cover areas related to the research itself. As researchers have to engage much earlier with their stakeholders due to the

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<sup>1</sup> Pathways to Impact, <http://www.rcuk.ac.uk/innovation/impacts/>

importance of the demonstration of impact from their research for the funding, the research itself has the opportunity of being shaped in some ways by the key user groups who can be consulted to give feedback at the outset of the research as opposed to being an afterthought when the research is being disseminated. This can lead to benefits in terms of the research agenda, methodologies, relevance of the research and even in increased access to participants. Having to engage with a research impact agenda at the beginning of the research also helps develop new skills in academic researchers who may not always be familiar with the possible end users of their research and will help raise individual profiles within an end user context as well as an academic peer environment. Being confronted with devising evaluation tools at the beginning of a project, adopting and using these tools throughout the course of the research and throughout the dissemination stage also enables researchers to build a bank of knowledge as to the successful pathways to impact of their research and enables that knowledge to be utilised within the discipline in terms of building a bank of case studies and adding to the achievement of best practice across academic disciplines and ultimately benefitting society as a whole.

Finally there can be a personal benefit to engaging with the impact agenda as it is being developed across the academic sector in the UK. Having to engage with stakeholders who are directly engaged or affected by your research can give real personal pleasure and enhance overall wellbeing as well as having the benefit of increasing your appeal and personal profile and notoriety within academia and on a much wider societal scale. The impact programme, driven by the research assessment exercise but ultimately by the UK government, has the characteristic of widening the research agenda for academic institutions and also for the individuals who work within its confines. This can only be a benefit to society as a whole and to the common good.

### **The UK Research Funding landscape**

Research funding in the UK has various providers. A primary source can be traced through a strategic partnership government funded body, the Research Councils UK (RCUK), which is an umbrella organisation that encompasses seven funding councils (). These councils, which are non-departmental public bodies, receive money from the Government's Science budget which is administered through the department of Business, Innovation and Skills (BIS). Some councils also receive funds from other governmental departments in addition to the money received from BIS. Other organisations who distribute research funding are also allocated money to propagate by BIS (such as particular academies or societies (please see below for a full listing of the governmentally funded bodies or strategic partnerships)). These organisations are tasked with distributing tax payer's money into research, mainly within academic institutions in the UK, and have to report to Parliament. The Science budget for the financial year 2015/16 was announced at £5.8bn and distributed between the funding bodies as shown in Table 1 below:

This budget was agreed under the co-alition government which was in place when the three year period of budget setting was determined in 2013/14. There are now fears that this pot of money which was ring fenced for research will be substantially reduced by the new Conservative government, although at the time of writing this chapter in November 2015, no announcements had been definitive in this area (Rohn, 2015). The lessons to learn in this context is that the ever changing landscape of research funding is

always in flux and difficult to navigate and only the institutions who have well developed strategies and research funding offices who will act as the liaison between the funding bodies and the academic faculty will be able to navigate these stormy seas successfully.

Governmental bodies are not the only source of research income available to the academic researcher. Industry, through privately owned companies or institutions also fund academic research, sometimes supported through the widespread guise of knowledge transfer agreements or partnerships (KTP's) between academic institutions and private companies related to specific projects or issues that the organisations may have. Charities and Trusts can also be sources of research funding such as Cancer Research UK, the Leverhulme Trust and the Joseph Rowntree Foundation who issue periodic calls for research to be carried out in specific areas of interest (please see the Vitae website at <https://www.vitae.ac.uk/researcher-careers/pursuing-an-academic-career/research-funding/where-to-find-sources-of-academic-research-funding> for more information).

Additionally, the European Union and other global institutions can be accessed for research funding, but the competition is enhanced, due to much wider pool of possible recipients. Horizon 2020 is one of the largest of these funding bodies with €80 billion of funding for research to be distributed until 2020 across the European Union. Finally academic institutions themselves can be sources of funding as they will offer grants to members of their academic faculty, often for short term or pump priming grants where the research is still at its inception stage.

An extra dimension has to be added to this section concerning research funding in the UK academic sphere and that is related to how the sector as a whole is benchmarked in terms of research output and which is also related to a potential funding from governmental sources in parallel to the funding provided by the funding councils as described above. The UK education government, including the Higher Education Funding Council for England (HEFCE), the Scottish Funding Council (SFC), the Higher Education Funding Council for Wales (HEFCW) and the Department for Employment and Learning, Northern Ireland (DEL) organises a periodical review of the quality of research emanating from UK universities through an assessment exercise which is based on specific criteria which ranks the submitted university outputs in a mass peer review comparison. This does not happen on a regularised basis but is periodical. A Research Assessment Exercise (RAE) was carried out in 2004 followed by the Research Excellence Framework (REF) in 2014. Impact was one of the criteria which was added to the REF in 2014 which did not exist in 2004. The next assessment exercise is due to take place in 2020 but the guidance has not been issued yet at the time of writing this chapter but it is expected that demonstrating research impact will be of even greater importance than for the assessment guidelines than even the past exercise in 2014.

### **What is impact?**

Like many definitions within an academic context, there are different approaches and interpretations related to the concept of research impact. It is helpful to view them with the lense belonging to the source of the definition. There is an added dimension as RCUK further divides impact into 2 strands, Academic impact and Economic and Societal impact. The definition for both can be found below:

**Academic impact** is the demonstrable contribution that excellent research makes to academic advances, across and within disciplines, including significant advances in understanding, methods, theory and application.

(RCUK)

**Economic and Societal impacts** are the demonstrable contribution that excellent research makes to society and the economy. Economic and societal impacts embrace all the extremely diverse ways in which research-related knowledge and skills benefit individuals, organisations and nations by:

- Fostering global economic performance, and competitiveness
- Increasing the effectiveness of public service policy
- Enhancing quality of life, health and creative output

(RCUK)

Economic and societal impacts are the type of impact which are sought after by the funding bodies and recognised in the UK research assessment exercises which forms the basis of the funding landscape for Higher Institutions in the UK. Two key aspects of this definition concern the terms ‘demonstrable’ and ‘excellent’. In the case of ‘demonstrable’, it is not enough to only focus on activities and outputs which promote the research, such as staging a conference or publishing a report. Evidence must be provided of impact related to the use of the research by policy makers, practitioners or that it has led to improvements in services and businesses for example. ‘Excellent’ research refers to the fact that in the case of the REF assessment exercise, the impact case studies submitted had to be based on at least one published peer reviewed paper which was ranked as ‘excellent’ in the peer review process. The definition of impact is therefore precise and needs to be assimilated in the context of the research landscape in Higher Education Institutions in the UK.

### Planning for Impact

As described in the definition section above, impact can be embodied in many forms, which includes but is not limited to: knowledge exchange; new products and processes; the creation of new companies, brands, institutions, all of which would lead to job creations; the development or enhancement of skills or brands; better public services; more effective public policies; a quality of life enhancement through better health for citizens; an increase of international development for UK private and public funded companies and bodies. In order to achieve research impact, as defined in terms of economic and societal benefits, many funding bodies suggest planning for impact early on in the research process (it now forms part of the application process in many grants) and have given guidance in terms of the “pathway” to impact and steps which can be applied in order to achieve the type of impact funding bodies are generally looking for and expecting from their funded research.

Advice on how to go about achieving research impact can be focused down to individual discipline areas, however, this section will offer some general advice,

principally based on guidelines issued in the area of social sciences, which can be adapted to other disciplines. It is also advisable to look for specific advice from the discipline domain but also from the specific research funder as this may vary. The ESRC provides a very detailed section in their website devoted to the steps to be taken to construct an impact strategy and has devised a very useful tool in the form of a ‘living document’ which is effectively a strategic plan for impact and which can be downloaded at:<http://www.esrc.ac.uk/research/evaluation-and-impact/developing-an-impact-strategy/>.

Before embarking on the first task of setting objectives, it is useful to reflect on and identify the key stakeholders for the research. This could include other researchers (in this case your impact would more likely to be linked to an academic impact as it veers towards an enhancement of the knowledge economy). The key beneficiaries could possibly include the public sector, businesses, citizens, industries (amongst others), all of which would be representative of economic and societal impact. Secondly, the reflection should extend to the possible identification of the value which the identified stakeholders could derive from the research. These benefits are not always completely predictable as beneficiaries of the research may be revealed at any time during the research and change the nature of the research reach, however it is necessary to reflect on the predicted ones. These could include but are not limited to; improving social welfare, enhancing public services, contributing to operational or organisational change within companies and industries, improving the health and well-being of individuals. Finally, before setting out objectives, the researcher must envisage how the proposed beneficiaries would have the opportunity to benefit from the research. Are they going to engage in public events (not limited to academic conferences which are not always practitioner facing), in media outlets, in governmental debates and policy? Time and resources also need to be taken into consideration at the inset and during the course of the research and the ESRC now suggest that up to 5% of total research grant should be spent on impact and engagement activities. Following reflection on the above, the following steps are suggested.

- The first step involves setting objectives.

Impact objectives should not be confused with research objectives which are two completely different entities. Impact objectives should be concise, simple and as measurable as possible. They should relate to the value of the research and engage with areas such as the building of awareness, the encouragement of participation, the enhancement of procedures or processes, the changing of policies, the betterment of societal issues etc.. These can be revised throughout the duration of the project and can also be flexible to include differing priorities as the research develops, such as a shift from engagement to participation for example. As influenced mainly by the business and management arena, it is also helpful if the objectives are SMART (Specific; Measurable; Achievable; Relevant and Time-bound).

- The second focus of the strategy involves developing clear messages which summarise the research.

Being able to describe the purpose of the research in simple terms without dumbing down the research is a skill which should be honed and developed by all academic researchers. Using different media to support the message can also be advantageous, a press release will be formatted differently to a research briefing. Taking time to think about the USP (Unique Selling Point) of the research, when using the analogy of business terminology, will help greatly in the process of developing the overarching key

messages of the project. Taking this further, in some cases, it may be useful to develop a branding strategy for the project and create a strapline, logo or visual mark which can be used across different formats and materials embodying the essence of the project and engendering a visual recognition cue. This will facilitate the connections between different research outputs and strategies and facilitate and support research impact.

- Thirdly, following your period of reflection above, create a map of the audience and potential stakeholders for your research.

In this area, it is important to think beyond the obvious; what outcomes might these potential contacts contribute to? How might they use the research? Again, this map can be fluid and evolving as new target audiences may emerge as the research develops. It is important not to try and reach everyone, but it is useful to rank the audiences according to importance and influence and keep track of the contact attempts and routes. In some cases it may be useful to use contact management systems.

- Fourthly, methods or channels of engagement need to be devised.

There are many conduits of communication and networking which can be accessed in order to interact with a potential impact audience. The nature of the audience is paramount in this context, the interaction with a press journalist will not be similar to that of a health specialist, for example. The use of social media as a dissemination support for research is useful and can include blogs, webspaces, Twitter feeds and Facebook pages as examples. However, as with all forms of social media, it is only worthwhile if the beneficiaries of the research engage with this form of communication. Social media engagement should ideally form part of a panoply of communication tools in which the messages relating to the outcome of the research are appropriate, adapted and targeted. The timeframe related to this communication is also important. It may only occur at specific points within the project and needs to be clearly differentiated from the communication involved with the sample gathering phase of the research. Furthermore, the message setting step of the impact strategy may need to be re-visited according to the audience characteristic and preferred channel of communication. Finally, two-way communication may also be useful and encouraged through a planned feedback mechanism with potential audiences or stakeholders. This may also form part of the indicators that can be used for the identification of the research uptake and use.

- A form of measurement needs to be devised in order to track and evidence impact.

Research impact is achieved through feedback from users but most crucially, through the evidence of change based on research. This can be demonstrated in a huge variety of ways depending on the discipline and the context of the research and the best way of identifying indicators for research use is to use the methods that have been trialed and consult the impact case studies which are currently published by your particular discipline. The REF website holds a database of impact case studies which were submitted during the 2014 UK wide research assessment exercise and which can be consulted at <http://impact.ref.ac.uk/CaseStudies/>. Examples of indicators include the introduction of a new code of practice for the poultry industry (Political); the use of evidence that powered rotation oscillation toothbrushes are superior to manual toothbrushes for oral hygiene in the marketing communication by Procter & Gamble (Health); air conditioning and automatic monitoring systems projects achieve savings of 33% of electricity usage in individual buildings (Technological).

## **Conclusion**

In conclusion, it is vital for all academic researchers to understand the funding landscape of UK Higher Institutions to be able to engage with the impact agenda and achieve funding. It is important currently, to build in evaluation of the research related to its stakeholders and reach from the beginning of a project or doctoral study and plan consciously for evaluating, monitoring and measuring impact throughout the life of the project. It is suggested that the impact agenda will be of greater importance in the next research assessment exercise in the UK and it is fitting, that in this current economic climate that academic research represents value for money for society as a whole.

# CHAPTER 2

## Mindfulness research in higher education: student perspectives, educator perspectives and the research gap

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### Introduction

Founded in the ancient Buddhist philosophy as Sati (Chiesa, 2012), mindfulness has evolved over the past three decades to be a subject of empirical study within the field psychology and has gained attention in the academic literature as applied in studies such as those related to mental and physical health (Woodruff, et al., 2014), criminal psychology (Parks and Mariatt, 2004), education (Langer 1997; Bush, 2011), relaxation and stress reduction (Hinterman, et al., 2012; Williams and Penman, 2011; Gilbert and Choden, 2013; Kabat-Zinn, 2013). Daily practice is known to increase acceptance, compassion, non-judgement, positivity and empathy, and ultimately helps to promote a calm and restful mind (Brach, 2011). In education, mindfulness supports student learning and improves student performance (Langer 1997). October 2015 has seen the publication of a Mindful Nation UK Report. The Mindful Nation UK report is the result of a twelve month inquiry by the Mindfulness All-party Parliamentary Group into how Mindfulness could be applied across the policy areas of health, education, criminal justice and the workplace (Mindful Nation UK, 2015). This is indeed recognition of the benefits of mindfulness, and although the focus of this report is school education, the report recognizes the increase in mental health issues amongst 17 to 19 year old youths and the benefits of mindful practice to improving the wellbeing and educational potential of this group. This paper is a result of a review of the literature and seeks to establish the benefits of mindfulness in higher education from the perspective of the student and the educator and also highlights the need for future large scale, multi-site empirical studies in relation to mindfulness in higher education.

### Review of the literature

The definition of mindfulness as a concept has been subject to debate over a number of years (Bishop, et al., 2004). Bodhi (2013) and Gilbert and Choden (2013) have proposed that the concept is broad, perhaps over defined, and in reality, difficult to capture in a single definition. Table 1 offers an overview of definitions of mindfulness.

**Table: Definitions of mindfulness**

Nairn (1999, p24)	“Mindfulness can be defined as knowing what is happening while it is happening, no matter what it is”
Bishop, et. al (2004, p232)	Component 1: “..the self-regulation of attention so that it is maintained on immediate experience, thereby allowing for increased

Two component model of mindfulness	recognition of mental events in the present moment”  Component 2: “..adopting a particular orientation toward one’s experiences in the present moment, an orientation that is characterised by curiosity, openness, and acceptance”
Bishop, et al., (2004, p234)	“..a process of regulating attention in order to bring a quality of non-elaborative awareness to current experience and a quality of relating ones experience within an orientation of curiosity, experiential openness, and acceptance”
Kabat-Zinn (2005, p 108)	“Mindfulness can be thought of as moment to moment, non-judgemental awareness, cultivated by paying attention in a specific way, that is, in the present moment, and as non-reactively, as non-judgementally, and as openheartedly as possible”
Gilbert and Choden (2013, p xviii)  Mindful compassion	“learning how to observe carefully what goes on in our minds”  “being open and receptive to suffering...how we then respond to suffering in ourselves and others”
Bodhi (2013, p 22)	“The word mindfulness is so vague an elastic that it serves almost as a cipher into which we can read virtually anything we want”

Source: Original

Although mindfulness itself is proposed by Bodhi (2013) to be somewhat vague, there are common elements within these definitions. Mindfulness is characterised above by the concepts of openness, awareness, empathy non-judgement, acceptance and being in the present moment. It is proposed by Gilbert and Choden (2013), to be inextricably linked to the concept of compassion as to be defined them by as “mindful compassion”, to be taught together as the key theories which culminate in a peaceful and enlightened mind. Whilst all of these definitions capture the essence of the concept, the most commonly quoted author in both the popular (Williams and Penman, 2011) and in the academic literature (Schmertz, et al., 2008; Chiesa, 2013), (although these are in many cases interchangeable), is that of Kabat-Zinn (2005; 2013), who has both academic integrity and popular appeal. This definition is thought to capture the concept of mindfulness (Weare, 2013) and can be summarised as moment to moment non-judgemental awareness.

### Mindfulness in higher education

The practice of mindfulness in school based education in general is fairly well established and a recognised body of literature proposing the application of mindfulness training in education has evolved over the past four decades (Capel, 2012). The prevailing opinion within this literature is that mindfulness training is beneficial to both the student and the teacher, although in recent studies Greenberg and Harris (2011) have proposed that current research has been not yet been sufficient to prove the benefits of mindfulness in education. The practice of mindfulness in higher education, and the

body of literature associated with it, however, is not so well established and although reflective mindful practices have been applied in the teaching of medical (Rosenzweig, et al., 2003; Shapiro, et al., 1998) and social work students (Mishna and Bogo, 2007; McGarrigle and Walsh, 2011), in a few cases been embedded in the curriculum (Bush, 2011), it is not generally a recognised practice in this field. The practice of mindfulness in higher education was developed and influenced by the eastern philosophy and practices of those who introduced it (Bush, 2011). The majority of research into education and higher education has been carried out in the USA, (Vacar, 2001; Caldwell, et al., 2010; van Aaldren, et al., 2014; Weare, 2013; Ramsburg and Youmans, 2013), although there is a growing body of literature from across Europe (Hyland, 2012) Asia (Mahani, 2012) and New Zealand (Mapel, 2012). Many of these studies have their theoretical basis in the discipline of psychology, where ontological and epistemological perspectives have tended towards the positivist philosophy of research (Caldwell, et al., 2010; Greenberg and Harris, 2011; Ramsburg and Youmans, 2013). On the whole therefore, the studies are single site, quantitative and are often based on fairly limited samples of college students (Lamis and Dvorak, 2014; Mapel, 2012). That is not to say that these are not relevant, however, sample size and the limitations of carrying out research in a single institution indicates a body of literature which is at the early stages of academic development. Few studies on the impact of mindfulness practices in higher education are based on qualitative data collection (Capel, 2012). Interestingly, Rogers (2001) proposes the reflective processes such as mindfulness are in themselves inductive because they start from the basis of experience, as opposed to deductive, where they would be theory based. Reflective studies therefore, by their very nature, lend themselves to qualitative, reflective method of data collection such as in-depth interview which, although they may be subject to the prejudices of the researcher, produce a richness of very personal which may be valuable in offering further insight into existing quantitative survey based results (Miles and Hubberman, 1994).

Langer (1997) and Langer and Moldoveanu (2000) have been prolific in the research and analysis of mindfulness practices in education as a method of advancing the student experience. Whilst these studies are applicable in educational settings associated with the education of children and teenagers, it could be argued that practices may need to be adapted for older students, however, Langer continues to be one of the most influential writers in the field of mindful education. In terms of higher education, Rogers (2001) offers a detailed analysis and application of reflection in higher education. He proposes that the term mindfulness is one of multiple terms and is used interchangeably with the term reflection, proposing confusion as regards terminology. Definitions therefore, of the application of mindfulness in higher education, have been more difficult to find. Lau (2009), however, proposes that:

“...it is evident that mindfulness practice is helpful in enhancing the academic performance of students through a holistic approach by developing the skills of emotional, bodily and interpersonal awareness” (p175)

If studies based on the experiences of the students are rare, then studies based on the education, experiences and consequent application of mindfulness by those teaching in education, the educator, are even rarer (van Aalderen, et al., 2014). Consequently this paper seeks insights from the body of literature pertaining to mindfulness research in higher education but also looks to the domain of school based education (Vacarr, 2001), life-long learning and education (Hyland, 2012), leadership (Ridings, 2011), the training

of teachers and training counsellors (Campbell, et al., 2012), and the generic mindfulness literature, for concepts and practices which are or might be applied in higher education (Kabat-Zinn, 2013). It is proposed therefore that there is a gap in the literature as concerns the exploration and application of mindfulness in higher education. This next part of the paper addresses studies and current practices of mindfulness in education from the perspective firstly of the student, the benefits, challenges and application. It then looks at mindfulness from the perspective of the educator and the benefits it can offer in developing student attentiveness, compassion, ultimately results, empathy, personal development and managing workloads and work based stress.

### **Mindfulness in higher education: The student perspective**

Zajonc (2013) proposes “a quiet pedagogical revolution” in higher education in the US over the past two decades, suggesting the development and application of contemplative practices and applications which offer a variety of educational methods that support student learning and help develop the creativity of the teacher in terms of course development. Hyland (2012), however, proposes that education is deficient in humanistic approaches to learning, focusing mainly on employability, despite the need throughout life for not only education, but for personal and emotional growth. Research indicates that periods of mindfulness practice ultimately improves the student learning experience and student performance (Ramsburg and Youmans, 2013). Results of academic studies reveal improvements in student concentration and attention, even where students have commonly suffered behavioural difficulties (Zajonic, 2013; Lau, 2009). Further research proposes that short periods of mindfulness practice encourages creativity amongst students and increases their motivation and engagement with learning (Hyland, 2012). Ultimately, this impacts positively on the experience of the teacher (Vacarr, 2001). In addition, mindfulness practice in education has been found to increase the student’s enjoyment of learning, helping them to focus on the present moment and decreasing stress, particularly in relation to performance related testing (Hede, 2010; Ramsburg and Youmans, 2013). Mindfulness practice has been found to have a direct impact on student performance by improving memory and increasing the meaningfulness of information. Indeed, in a study carried out with college students, using a group who did meditate and a group who didn’t, Ramsberg and Youmans(2014)propose that even six minutes of meditation improved cognitive skills necessary to increased information retention. At a personal level, mindfulness has been found to increase students interpersonal awareness, improving relationships with peers and teachers, decreasing the stress which is endemic in competitive educational environments and increasing the quality of sleep, conducive to improving performance (Langer 1997; Lau, 2009; Caldwell, et al., 2010).

Langer (1997) and Hyland (2012) both question the education system as a whole in terms of its lack of humanistic conception and in its encouragement of mindless teaching, meaning that educational institutions and teachers often offer clear sets of instructions which do not encourage questioning and inquiry by the learner. They propose that mindfulness practice encourages creative thought which is absolutely central to the learning process. Langer and Moldoveanu (2000) propose that:

“Students feel stuck and listless in the classroom. Their teachers often absent-mindedly slog through long winded lectures and sermons” (p 6)

These problems, they propose, can be addressed by introducing mindfulness into the curriculum, encouraging students to be in the present moment and broadening student understanding; not only through educational learning but by helping them to build an awareness of themselves as creative individuals who can and do contribute to the learning process. Ultimately, the teaching of mindfulness in the educational setting addresses the “whole person”, not just in terms of formal education itself, but also in the education of better citizens who are more compassionate and empathetic to society as a whole (Miller, 2007) and who will carry these skills not only into society but also into the workplace, ultimately creating better workplace relationships (Ridings, 2011). This is what Lau (2009) refers to as “holistic education”, or “multidimensional education” (Mahani 2012), developing the whole person and producing citizens who are well rounded and informed, indeed enhancing their understanding and promotion of social responsibility (Weare 2013), a growing issue in both education and commerce. Lau (2009) recommends therefore, that mindfulness be a daily activity in educational practice. Zajonic (2013) proposes:

“I am advocating for a contemplative as well as a critical intellectual education, one that seeks a comprehensive and deep understanding of self and world. Suffering and evil will fall away only when we have attained such understanding” (p 91)

Ultimately, Weare (2013) proposes policy developments which allow for funding of mindfulness in education, given its impact on academic performance and on learning.

There are a number of issues which have been raised which apply to the teaching of mindfulness in an educational setting. Firstly, Kabat-Zin (2013) raises the issue of the training which is necessary to become a teacher of mindfulness. Teaching training for mindfulness is now widely available, however, the issues is of practices being introduced where people are not properly trained and may not even be practitioners. This is worrying, partly due to the fine line between perspectives of goal orientated popular psychology which lacks theoretical foundations and can be contradictory in proposed application and true mindfulness practice which is conceptually consistent and is being continually researched. The results of this could ultimately be damaging to students. Secondly, Mapel (2012) poses the question of how much theory needs to be taught versus simply teaching mindfulness as an experience. The tendency in higher education, and particularly in business and social sciences, is to focus on theory as a basis for learning and practice, however, mindfulness is experiential. Interestingly though, the students who were the subjects of Mapel’s study stated a preference for having a theoretical underpinning, which they felt would increase their willingness to participate. This result is likely to have been influenced by the age of the participants in the study and the level of higher education at which they were studying, possibly showing a level of experience and curiosity not necessarily present in younger students. Further studies by Vacarr (2001) highlight the benefits of mindfulness within education in the face of increasing diversity in society and in the classroom. She proposes that mindfulness encourages empathy where there is diversity amongst students within the educational setting. In increasingly diverse societies, mindfulness, she proposes, allows students to share perspectives, and increases their understanding of “difference, power, fear, domination, shame, oppression and connection” (p295). In a safe setting led by a trained educator, students can explore their differences and experiences with the input of mindfulness which increases empathy and curiosity. This is an area which requires further research but which can ultimately decrease incidences of racism, sexism and religious bigotry within society.

## **Mindfulness in Education: The educator perspective**

What then are the conditions necessary to encourage mindful, reflective learning? Rogers (2001), Lau (2009) and Langer and Moldoveanu (2000) propose that there must be an educational environment which encourages questioning and challenging of convention but also an environment which allows reflection, and encourages autonomy, an environment which sets challenges, encourages student interaction and offers regular opportunities for feedback. Thus they propose that the most successful reflective learning takes place where students are challenged and supported by those who are educating them. This can only occur, Rogers (2001) proposes, in a safe environment where trust is paramount.

Studies by Campbell, et al., (2012), found that mindfulness training for counsellors not only increased awareness and empathy towards subjects, but made them more responsive, less judgemental and more focused. The key here though is that the study presumes that the counsellors studied are also practitioners. Teachers, however, may or may not choose to practice, which may ultimately make them less effective in their use and teaching of mindfulness. Further studies by Weare (2013) propose an increased effectiveness of mindfulness training in education where those involved in teaching were the embodiment of the philosophy itself and utilised their training within their everyday lessons. The skills of the teacher are associated with listening mindfully to the student, giving trust to the students to speak openly and make positive contribution and decisions, offering kindness to students in the classroom, showing genuine interest in their subjects, having empathy with the students in their experience of the learning process and finally demonstrating patience and non-striving behaviour (Weare, 2013). This last one is interesting. In the face of educational targets for progression and achievement, few educational institutions may be willing to encourage non-striving, however, as part of mindfulness it is core to the theoretical basis (Kabat-Zin 2013). Weare (2013) recommends that teachers take part in the eight week adult mindfulness programme (MBSR), commonly available to educators within the sphere of higher education as study for personal development, to help bring mindfulness practices into education. She proposes that in increasing teacher wellbeing, mindfulness education will, for the teacher, increase their effectiveness in providing emotional and behavioural support for their students and ultimately increase learning effectiveness. Additionally, the eight week course has a very positive impact on work related stress, which will ultimately impact on work based performance, building empathy not just for students but also for colleagues. According to Weare (2013), teachers have reported increases in their own motivation and ability to manage within the classroom. Additionally, they have been able to build better, more supportive relationships with their students, the effects of which are still present in follow up studies carried out after three years.

Teachers in higher education increasingly, manage large class numbers and as in the school and further educational settings, carry out increasingly onerous management duties (Capel 2012). In higher education as in education as a whole, this can result in neglect of the individual student, particularly where extra support is needed. Capel poses the question which is as relevant to adult and youth learning as it is to children. Under such circumstances, how can we enhance and the student learning experience? Again, this is about mindful approaches to teaching which discourage stereotyping in learning and improve the learning experience and quality. She proposes that within education there is often a mindless approach to learning, where routine and lack of time can mean a lack of variety and change within the curriculum the way in which it is

taught. Langer (1997) would propose that we often teach habitually and process our pedagogic approaches automatically. This is not surprising given the pressures of working in higher education where economies of scale result in classes of up to 500 students, lessening the opportunity for interaction during lecture times. Even in smaller seminar classes, as highlighted by Langer (1997) and Capel (2012), uniformity of teaching materials for consistency of learning experience across large numbers of students and teaching staff can lessen opportunities for creativity in teaching approaches. Additionally, it discourages mindful interaction between teacher and student, thus missing the opportunity to build student self-esteem and encourage academic enquiry (Eccles, 2009). In teaching mindfulness to those involved in higher or school based education institutions, we are helping them to identify where, in the face of the proposed adversity, there may be more opportunities to be more mindful (van Aalderen, et al., 2014). For example using techniques proposed as the tenets of leadership conversations, to encourage mindful dialogue between teacher and student (Ridings, 2011), such as being mindful in exchanges, staying in the moment within the conversation without thinking ahead to what you are going to say next; in listening, fully concentrating on what is being said without drifting into thought; and in offering constructive feedback which encourages and motivates rather than criticises. Ultimately, Langer (1997) proposes that teachers in the school setting who engage in mindful learning through dialogue with students, are able develop an openness to new ideas and engage in co-creation of the learning experience. To this end, she proposes that both teacher and learner question educational concepts and are more critical of conventional theory, ultimately encouraging and enhancing learning and retention. The literature on mindfulness in higher education, as it stands, focuses on the student. There is a need therefore, for further research into the mindfulness and its impact on the educator.

## Conclusion

It is difficult to see that without the aid of educational policy and intervention (Weare, 2013), there is likely to be further promotion of mindfulness in higher education in the near future. We can only hope that the further publication of research studies on the subject of university education might promote the pedagogic benefits of integrating mindfulness practices into this educational setting in the way that it is currently used in primary education. It is being introduced to workplace settings as a means of reducing work based stress. In higher education, this is likely to encourage enquiry and thus further the state of current research, however, despite the obvious benefits to education and society, this is not at the forefront of government policy. Interestingly, however, mindfulness practice and training are inexpensive and the benefits clearly outweigh any cost that may be incurred. It is more a case of engaging influential minds in both policy making and in educational institutions. Ultimately, in an environment where achievement is at the forefront of measurement of success both by the student and by institutions themselves, it may be that increasing student performance is at the heart of the debate. There is clearly, therefore, the need for further research into the effectiveness of mindfulness in higher education, both from the perspective of the student and the educator to inform and progress policy significantly.

# CHAPTER 3

## Awareness and Acceptance of Mobile Marketing

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### Introduction

The vast popularity of mobile phones, especially smartphones is evident although this does not automatically guarantee the success of mobile marketing strategies.

It is a relatively new medium in the marketing world and although an exciting opportunity there are many challenges relating to consumer attitude which need to be understood and managed effectively to ensure future success.

In this chapter, the various methods of mobile marketing will be described to show how the consumer is targeted as well as detailing the effectiveness of each method.

Advertising in one form or another has been around for centuries, but now advertisers have taken advantage of the development of new technology and the increase of creative innovation, which have made it easier for brands to target the masses and disseminate their desired message (Straubhaar, LaRose & Davenport, 2013).

Mobile phones are no longer used solely to make phone calls. This is evident with the introduction of smartphones, which allow consumers to access the Internet as well as mobile applications (McCabe, 2013). Mobile technology has changed the face of marketing, and is continually evolving. The way smartphones/tablets combine technology is described by (Krum,2010) as bridging the gap between the interactive world in which we market, and the real world in which consumers live.

The enormous popularity that smartphones have achieved helps to present an interesting and exciting opportunity for marketers. The Mobile Marketing Association (2014) describes mobile marketing as “a set of practices that enables organizations to communicate and engage with their audience in an interactive and relevant manner through and with any mobile device or network”. This allows marketers to not only spread their message across a medium, which can target millions but also interact with consumers to produce personalised content.

It is important to consider the various types of mobile marketing available to consumers, as some of the methods might be more appealing than others. Recent research has found that 70% of consumers now welcome mobile ads on their smartphones as well as 70% of mobile searches resulting in action within an hour (Wells, 2013).

These figures show that certain methods of mobile marketing are effective but it is essential to remember that the fast developing nature of the mobile technology can introduce changes in the consumer opinion. New innovations and breakthroughs can increase or decrease consumer receptiveness depending on their sensitivity to change.

Marketers need to adapt to the needs of the customers and ensure they can provide the information and content that they desire.

The advances and development of technology in recent years have paved the way for mobile marketing success and the ability to provide consumers with personalised information while they are on the move is just one of the benefits that was not previously available. There is a fine line between giving the consumer what they want and appearing intrusive with a recent study suggesting that 77% of respondents felt that mobile advertising often feels like an invasion of privacy (Spence, 2014).

### **Advantages and disadvantages of Mobile Marketing**

The first advantage is the fast and easy access to information. Mobile phones are not limited by their location. They become a part of the user and create a strong bond. The flow of information is constant and readily available for the user, something extremely important from a marketing perspective (Powell, 2010).

An example of the ease of access to information can be taken from Location Based Marketing (Ryan, 2014) but this method must be managed with care as consumers could find the unexpected advertising intrusive.

Another advantage of mobile marketing is the level of interactivity and personalisation that can be achieved by marketers. The modern consumer is no longer satisfied with the mass-market generic messages of advertising, which has previously been used (Penfold, 2011).

The next advantage is the ability of mobile marketing to save consumer time. The smartphones are functioning as an extension to the P.C. allowing users to combine features of a conventional phone with the ability to check emails and browse the Internet. Consumers now have the ability to make a purchase from home or on the move saving themselves the time and effort it would take to go into a store.

If we consider also the disadvantages, we need to mention the invasion of the privacy. A recent global study conducted by the creative digital agency Razorfish, found that 77% of global respondents felt that it was an invasion of their privacy when adverts targeted them through their phones (Lepitak, 2014).

Marketers need to be selective and ensure that the information provided is mutually accepted.

Another disadvantage is spam. Consumers are afraid of receiving unwanted communication in the form of text messages or multimedia messages. Also, they do not want to be part of a scam where customers are charged to receive messages (Castells et al., 2009).

### **Methods of Mobile Marketing**

There are various types of mobile marketing, all of which are designed to target the consumer in a different way. Marketers will need to understand their target market's wants, needs and desires to ensure the most reliable method has been chosen.

Mobile messaging is one of the methods used by mobile marketing. This method can be spread through a number of channels such as SMS (Short Messaging Service), MMS (Multimedia Message Service) or email messages. It has been described as a quick and easy way to communicate with a customer using a mobile and drive a desired response, which could include driving sales or offers, promoting a product or notification of an event (Ehrlich, 2013).

Mobile messaging becomes a convenient tool for consumers to interact with promotional games, such as lucky draws or contests. Promotional games are usually announced on other media to invite users to participate in by sending an SMS or MMS to a certain number. Such kinds of SMS or MMS games are used to promote a wide variety of brands, especially those that have an element of fun in their brand promise (Brash et al., 2001). Most importantly, it is a way to help the marketer to get the mobile phone numbers of consumers who are interested in the campaign for further messaging.

Similar to traditional coupons, SMS or MMS coupons enable consumers to get a certain benefit such as a price reduction or free items (Brash et al., 2001). Some coupons are “pushed” directly to users’ mobile phones. Regardless whether the messages were “pushed” or “pulled”, the personal nature of the mobile phone enables the company to provide specific coupon offers according to the interests of customers. Information about Product/Service/Promotion Information is always important to help customers make decisions. Mobile phones are at-any-moment tools for customers to get information about a product, service, or promotion. The SMS or MMS enables the company to distribute time sensitive information about their products, services, and promotions. The message can also be location sensitive. The widely used Global Positioning System (GPS) technology and other new technologies help the operators to locate users with great precision (Moss, 2002). Companies can provide offers according to the location of a customer to meet his or her immediate needs or give an incentive for impulsive purchases. Mobile Messaging Services Technologies provide companies with opportunities to offer new services to their customers. This may help to build up their competitive advantages in the market of the same category.

Another method of Mobile Marketing is mobile advertising. The popularity of mobile advertising is growing on a daily basis with forecasts suggesting that worldwide mobile ad spend will increase by 84.7% in the next years (Bond, 2014). The most popular used types of mobile advertising are mobile display advertising and paid search advertising.

Display advertising includes the text, video and graphical banners, which are present when using mobile websites, apps or games, usually at the top or bottom of the screen. They are generally interactive, with a “click” having the ability to redirect you to a website, initiate a phone call or the download an app.

The use of paid search ads has increased at a much higher rate on mobile devices compared with desktop devices suggesting that users of mobile devices are more likely to be receptive to this form of advertising (Chaffey, 2014).

An “app” or application can be a good way to grow a client base, spread brand awareness, create goodwill with existing clients or monetize the mobile channel (Krum, 2010).

Apps are small programs for smartphones. Generally they are grouped by subject or functionality: for business (to make lists, to remember events, to edit documents, to

make free calls, etc.), for city living (to find restaurants, to be informed about the events that are going on in the zone where the user is placed, to find the parking where the car has been parked), for free time (to communicate through social networks, they are apps about books, news, to take and to edit photographs, to draw, ...), apps are useful to play and to entertain (puzzles, strategy games, sport games, gambling, flight simulators, ...), for the house (about cooking, shopping lists, to organize bank accounts, to entertain children), for trips (guides, schedules of public transport, dictionaries, maps) and useful apps also for health and well-being (personal training, sports, forecasts, between others) (Clark, 2009).

Apps are of great interest and curiosity for the users of mobile phones, being already highly unloaded and used for the users of smartphones, that it is why the brands want to be also present in the world of the applications and to manage his brand across them (Gonzalez, Z., Contreras, R., 2012).

Mobile applications are a format with growing popularity but it does not mean that all the brands have to have apps, it is important to take into consideration the type of public whom it is directed the product, what uses they do with their mobile phones, if they have a smartphone,... Marketers should bear in mind the importance of the aims of the brand and the best way of communicating these messages to the public (Snyder, B., 2009).

Probably one of the reasons of the high popularity of the branded apps in the area of marketing is the enormous capacity of engagement and the positive impact that presumably the apps have on the attitude of the users towards the brand (Hutton & Rodnick, 2009). There are studies that complement these opinions saying that interactivity and the experience that the user experiences during the use of the application are possible reasons for the demand of branded apps (Calder, Malthouse & Schaedel, 2009).

Some research has revealed that among some of the most important attributes to capture engagement include: vividness, novelty, motivation, control, customization, feedback, and multi- capability (O'Brien & Toms, 2008). Specifically, the studies from Kim, Lin and Sung demonstrate that these global brands provide mobile environments in which "their branded app users can easily 'control' all the views within the apps". The users are able to navigate through an app by means of on screen app interfaces adapted to mobile device touch screens. (Kim et al., 2013).

According to Noah Elkin from (eMarketer, 2010), it is obligatory in any campaign where there is a branded app, that the development and launch of an app has to be part of a plan of integral communication, has to be in agreement with the management of the brand in other tools of communication developed, does not have to be a separate action but a campaign of the same strategic plan. In this way, we cannot assure an enormous success, since it depends on several factors (category of product, attractiveness of the application, added value, usefulness and / or entertainment of the application, success of the campaign in general, ...) but we can be sure that failure is avoided. In addition, it is indispensable that the applications provide to the user any of these experiences: amusement, saving of time and / or comfort in the use.

Finally, the last method we will mention is the Location Based Marketing(marketing that uses the location of a person or object to provide information regarding a product or specific service to that location). (Pura, 2005)

This method allows marketers to deliver relevant and valuable information to the consumer at the right time, place and situation (Buczkowski, 2012).

It is obvious that there are numerous ways in which marketers can use mobile marketing to target the consumer, all of which hold different characteristics. Mobile marketing presents the opportunity to entertain, inform and drive purchases but to achieve this marketers must first understand their customers. It is the responsibility of the marketer to understand the needs and desires of their consumer in order to select, not only the appropriate information, but also the most suitable method to disseminate this information.

### **Conclusion**

The mobile phone has become more than just a personal tool to talk with families and acquaintances. It has now become an assistant of daily life. More and more people begin to use mobile phones to track their stock portfolio or bank accounts, check movie or plane schedules, buy tickets, send and receive emails, play games, read news, and so on. Technology development is a main driver for the boom in various applications of the mobile phone. Meanwhile, the high penetration rate of mobile phones also facilitates the mobile industry.

With the recent evolution of mobile technology, marketers notice that mobile marketing may bring opportunities to develop new marketing strategies. As “the prospect of millions of consumers carrying a ‘personal communicator’ is too great for any marketer to ignore” (Siber, 2001), mobile marketing has become a hot topic for marketing experts. Marketers have developed several methods of marketing communication forms through mobile phones. Their contents vary from the simple text message to the complicated game, and the strategies are also diversified to several models such as viral marketing and permission marketing. The mobile phone as a personal, interactive, and immediate channel has been considered of great potential for marketing communication.

Compared with the Internet, the mobile phone as a new medium has received much less attention from communication researchers. It is ironic since no one could neglect the fact that mobile phones are used much more broadly now in the world than the Internet via PC. When mobile phones become ubiquitous in people’s lives, their impacts on societies are worth closer investigations by communication researchers. With more and more diversified mobile applications, the areas that have been influenced by mobile phones have extended from individuals, social relationships, and organizations to marketing places. Newspapers, television, radio, and the Internet are all media that become commercialized by marketers. Now it is time to witness the commercialization of the mobile phone. As a new medium, the mobile phone has its unique characteristics and also combines some common features of the other media.

The best mobile marketing strategies are presenting innovative ways to drive long-term engagement and brand awareness through active consumer participation using for example location and time-targeted reminders to boost conversions or raising brand awareness and participation through gamification.

# **CHAPTER 4**

## **A critical examination of the use of digital media channels in developing customer relationships within Third Sector organisations**

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### **Introduction**

This project attempts to investigate how charities (brands) are using digital media channels in developing relationships with donators (consumers) in order to increase donations. It also examines the usage of social media within the third sector, which compromises voluntary organisations, charities, community groups, and social enterprises, that are government independent and driven by the need to “achieve social goals” such as improving public, environment or economic welfare (National Audit Office). The intended research wishes to compare one charity organisation from the UK and one from the US. It aims to expand the current literature and contribute to knowledge about charity organisations, their digital marketing strategies and social media usage. Moreover, it will result in a framework of best practice in terms of acquiring new donators and strengthening the relationship between digital brands and consumers.

As Couldry (2012, p. 2) indicated, the term ‘digital media’ refers to infrastructures and institutions that produce and distribute their content through the Internet, understood as a “network of networks that connects all types of communication from one-to-one to many-to-many”. One component of digital media, however, seems to be of particular interest in the context of the project: social media. This type of media is a group of applications based in the Internet, which allow exchange and creation of various forms of publicly available media (Kaplan & Haenlein, 2010). It includes a wide range of online platforms such as blogs, chat rooms, service ratings forums and websites, and more. As previous research (Mangold & Faulds, 2009, p. 358) has indicated, the 21<sup>st</sup> century is witnessing “an explosion of Internet-based messages transmitted through these media”, which “have become a major factor in influencing various aspects of consumer behaviour including awareness, information acquisition, opinions, attitudes, purchase behaviour and post-purchase communication and evaluation”. Moreover, as The Social Media Marketing Report (2014) announced, the Internet also has a great influence on marketers. The report pointed out that 92% of marketers confirmed the importance of social media usage for their business. In comparison, the same opinion was shared only by 86% of marketers in the previous year, which testifies to the rise of social media usage in digital marketing. Therefore, it is essential for charity organisations, understood here as brands, to market themselves effectively by using digital marketing and social media tools in order to acquire consumers, understood here as donators.

According to the Charity Commission (2015) the UK has 164,889 charities registered and this number increases every year. Between December 2013 and September 2014 this sector grew by almost 400 new organisations. In the US there are over 1.5 million non-profit organisation registered (National Center for Charitable Statistics [NCCS],

2015). Moreover, charity organisations in the US are more developed in terms of social media and mobile applications usage. Stakeholders from the US can choose between a wide variety of online platforms and methods to donate money. Unfortunately, the UK's charities still do not take advantage of this wide range of possibilities. Although the Visceral Business' Charity Social 100 Index (2013) indicated that the UK's charities use such social media platforms as Facebook, Twitter, LinkedIn, YouTube and Google+ to strengthen their relationship with donators, there still appears to be little understanding of alternative, online methods in acquiring donations within the third sector in the UK.

## Literature review

At this stage of the project, part of the section of the literature review concerning the business strategy is complete.

According to Bracker (1980), the origin of the term 'strategy' derives from the Greek word 'strategos' which means 'a general'. He indicated that elemental principles of the strategy were discussed by Homer (8th Century BCE) and Euripides (480-406 BC). Bracker writes: "The Greek verb 'stratego' means to plan the destruction of one's enemies through effective use of resources" (1980, p. 219). This statement illustrates the nature of strategy quite accurately even though it is rather too aggressive in terms of marketing.

Many scholars and researchers have argued about the nature of strategy throughout the years and have looked for a consistent and comprehensive definition of this concept. Nowadays, there can be different approaches found in its description. According to De Wit and Meyer (2010), existing literature on the subject indicates that fundamental concepts are questioned and this area appeals strongly differing opinions. Authors indicate that those views "mean that strategy cannot be summarized into broadly agreed on definitions, rules, matrices and flow diagrams that one must simply absorb and learn to use" (2010, p. 3). Nevertheless, attempts to summarize this concept exist

According to Bracker (1980, p. 219), the first modern scholars to describe the concept of strategy in business were Von Neumann and Morgenstern (1947) with their publication *Theory of Games and Economic Behaviour* in which they define a strategy as a series of actions undertaken according to situation (1947, pp. 79-84). Bracker also refers to the publication of Hofer and Schendel titled *Strategy formulation: Analytical concepts* (1980), which compared 30 years' worth of modern authors' concepts about business strategy (1950-1980). Those scholars focused on major disagreements in three areas: the broadness of the concept, its components, and the process of strategy-formulation, despite failing to consider similarities between them (1980, pp. 219-221).

Richard Whittington (2001) exposed different assumptions underlying those approaches and identified four main schools of strategic theorising: the Classical, the Processual, the Evolutionary and the Systemic. He categorised them according to different views of strategies and their accomplishments, as well as what makes the perception of outcomes and processes the sole criterion of division. Moreover, this comparison was made through a Western viewpoint and therefore it is useless for other markets since it does not take their specifics into account.

Whittington located mentioned approaches on a process/outcome axis (Figure 1):

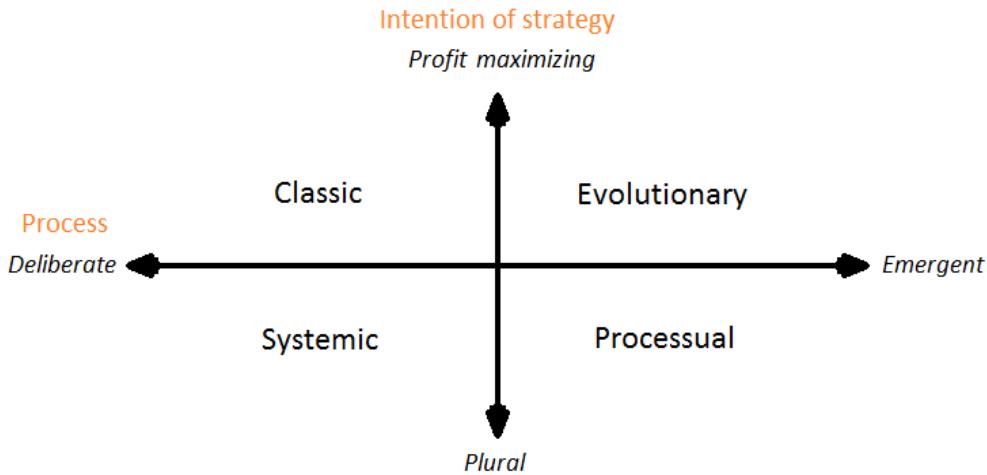


Figure 1. Four generic perspectives on strategy. Source: Whittington, R. (2001) *What is strategy and does it matter?* Cengage Learning EMEA.

### *The Classical perspective*

The Classical perspective, driven by philosophy of economic theory (Fifield, 1998, p. 8), emerged in 1960s through publications of Alfred Chandler (business historian), Alfred Sloan (former president of General Motors, a businessman), and Igor Ansoff (a theorist), who established key aspects of this approach. Fifield, however, argues about the origin of this perspective and writes: “The classical approach is the way that we have always been taught (from an extremely early age) that things ought to work” (1998, p. 11).

Classical perspective places emphasis on profit maximizing as a principal objective for an organisation (Whittington, 2001). It is also strongly attached to rational analysis and separates conception from both execution and changes of any marketplace (Fifield, 1998). It assumes that strategies are “planned in a rational fashion by the chief executive of the organisation, with little account taken of any unpredictable responses which might come from other competing firms or individuals with different objectives” (Haberberg & Rieple, 2001, p. 644). In other words, this perspective considers a manager as a person who has almost complete control over allocation of both internal and external resources of the company. Strategic behaviour is hence guided by opportunism, rationality, and self-interest (Mazzucato, 2002, p. 8). Another scholar sharing this approach, referred to as a “strategy guru” by Whittington, (2001, p. 2), is Michael E. Porter who is the author of an important article published in Harvard Business Review (1996) and a Competitive Strategy framework (1998). The former publication discusses different basis for positioning (variety, needs, access or a combination of them) in order to acquire more customers hence maximizing profits. In the same paper, Porter also claimed that decisions can be defined as strategic only if they consciously involve doing something different from other competitors and the

consequence of this difference is a sustainable advantage (Mazzucato, 2002, p. 8). Moreover, according to Chandler (1962), strategy involves a determination of the essential long-term objectives of the organisation and “the adoption of courses of action and the allocation of resources necessary for carrying these goals” (1962, p. 13).

In conclusion, the Classical perspective is embedded in a logical and rational approach; however, since it does not take unpredictable and uncertain conditions into account, it also appears more suitable for mature, stable and sizeable businesses rather than small or new ones. Therefore, it is not applicable for a global market. It is also worth noting that it arises from the very specific American context of the 60s. As Michael French indicated (1997, p. 45), in 1961-1969 the Gross National Product of the US increased by 3.6 per cent per annum and the unemployment rate declined 6.7 per cent at the beginning of the decade to 3.5 per cent by the end of it. Accordingly, it was undoubtedly the finest and most sustainable period of the United States’ history in terms of economic expansion.

Many scholars have criticized the organisations’ emphasis for profit maximization. Rothschild (1947), for instance, suggested in his article “Price theory and oligopoly” that the main motivation of an entrepreneur is survival, not profits in particular, and the aim of decisions is to maximize the security level of the company rather than profits. He also implies that “there is another motive which cannot be so lightly dismissed, and which is probably of a similar order of magnitude as the desire for maximum profits: the desire for secure profits” (1947, p. 308). Those words lead us to another critique on the Classical perspective, shared with Rothschild by Simon and Margolis. They all argue that the goal of making satisfactory profits should replace the need of maximizing them (Margolis, 1958). Simon also stated that those satisfactory profits represent the aspirations of the firm, which might change over time (Simon, 1979, p. 14): “A vague principle would be that as the individual, in his exploration of alternatives, finds it easy to discover satisfactory alternatives, his aspiration level rises; as he finds it difficult to discover satisfactory alternatives, his aspiration level falls.”

### *The Processual Perspective*

As aforementioned, the Classical perspective arose in the 60s. The succeeding perspective, the Processual approach, has its roots in the next decade. The Western world witnessed an economic turbulence back in the 70s – the collapse of the Bretton Woods system in 1971, the stock market crash in 1973-1974 and the oil crisis in 1973 – resulting in the 1973-1975 recession (Davis, 2003). Those changes in the western world’s market also affected strategy theories. The Processual approach consequently emphasises the disorganisation of an institution’s life (Whittington, 2001, p. 21). Processualists understand the irrationality of strategic processes emerging in small steps and highlight the limits of human action.

The first scholars forming this approach were James March, Richard Cyert, and Herbert Simon (Nobel Prize-winner in Economic Sciences, 1978), all associated with the American Carnegie School. According to those thinkers, people are “unable to consider more than a handful of factors at the time”, “reluctant to embark on unlimited searches for relevant information”, “biased in [their] interpretation of data”, and “prone to accept the first satisfactory option that presents itself, rather than insisting on the best” (Whittington, 2001, p. 21). Moreover, as stated by the American Carnegie School, organisations are combinations of individuals, and all of those individuals have their personal goals and cognitive biases to the firm. Thus, a strategy is a product of a

compromise, not particularly a profit-maximizing calculation (Whittington, 2001, p. 22), and people are too different and might therefore not agree on an optimal plan when it comes to interests, knowledge, or attention.

One of the most known Processualists, Henry Mintzberg (1998), introduced the concept of the 5Ps – interpreting a strategy according to five distinguishing definitions: strategy as a plan, a ploy, a pattern, a position, and a perspective:

- *Strategy as a plan.* This understanding raises the problem of cognition and intentions. It deals with leaders and their actions in order to set directions and courses for organisation. According to Campbell et al. (2011), ‘planners’ usually produce documents that detail and specify what the company is going to do for a particular period of time and they tend to monitor the process during its predetermined duration. As pointed out by authors, it might also concern new product launches, human resources changes or financing (i.e., raising funds).
- *Strategy as a ploy.* It usually has limited objectives and might change within a short period of time. Mintzberg (2003) described a ploy as a “realm of direct competition, where threats and feints and various other manoeuvres are employed to gain advantage” (2003, p. 9). A ploy might be also used as a threat – for example the company may threaten to change the price of a product in order to destabilize competitors (Campbell et al. 2011, p. 4).
- *Strategy as a pattern.* As stated previously, the strategy might be intended (as a general plan or a specific ploy), but it can also be realised. Mintzberg points out that the pattern reminds us about taking behaviour and action into account while describing strategy – as without them the concept is empty and pointless (2003, p. 9). In other words, a pattern is a realised strategy, even though it may appear without preconception (unlike a plan) or intention (unlike a pattern).
- *Strategy as a position.* This component of a strategy locates the organisation in its competitive environment. As claimed by Mintzberg, this component of the strategy highlights the way the organisation finds its position and protects it to meet, avoid or subvert a competition (2003, p. 7).
- *Strategy as a perspective.* This component applies to an ingrained way of perceiving the world and raises questions about behaviour and intention in a wider, collective context. Strategy as a position concerns the spot between organisation and external environment, where our product meets a customer, while strategy as a perspective looks inside the organisation. Moreover, it “raises the issue of how intentions diffuse through a group of people to become shared as norms and values, and how patterns of behaviour become deeply ingrained in the group” (2003, p. 9).

Mintzberg (1987) also proposed the poetic metaphor of managers as craftsmen and a strategy as their clay. According to the author, the world is full of unpredictable surprises and strategists should have the same adaptability, awareness, and retain the likeness of craftspeople that shape their clay by personal touch while their mind and hands work together.

In conclusion, the Processual perspective assumes that the long-term construction and the merge of specific internal competences are integral to a strategy. According to Whittington (2001, p. 26), “Strategy is not about choosing markets and then policing performance, but about carefully cultivating internal competences.” Therefore, the maximum performance is based on focussing, (the attention to implement objectives),

exploiting markets (that are not perfect to develop distinctive competences), and being flexible for incremental adaptation.

### *The Evolutionary Perspective*

The Evolutionary perspective is one that is also less confident about managers' ability to act rationally. Instead of relying on managers, this approach assumes that profit maximization will be secured by markets (Whittington, 2001). Furthermore, according to Einhorn and Hogarth (1988), both evolutionary theorists, it does not matter what methods managers will adopt since only the best performers will survive.

This perspective stands in a strong opposition to the Classical approach because, as claimed by Bruce Henderson (1989), it does not agree with the simplification of the market's environment and considers its postulates too unrealistic and abstract. The author implies that:

Classical economic theories of competition are so simplistic and sterile that they have contributed less to understanding than obstacles. These theories postulate rational, self-interested behaviour by individuals who interact through market exchanges in a fixed and static legal system of property and contracts (p. 143).

Furthermore, Henderson believed that Darwin might probably be "a better guide to business competition than economists are" (1989, p. 143), which seems to condense the Evolutionary perspective. It emphasises the limited capability of organisations to anticipate, adapt, and react purposively to shifts in environment, just like complex organisms according to the Evolutionary theory (Whittington, 2001, p. 18). As Aldrich (2008, p. 107) indicated, "a great deal of variation is introduced into an organization or population of organizations through error or random variation, rather than through planning or the conscious generation of alternatives." In other words the success of business is a result of happenstance, not hard work and managers' plans, while a strategy itself is perceived as a "dangerous delusion" (Whittington, 2001, p. 19). Richerson et al. (2006) proposed examples of hypotheses flowing from evolutionary perspective in the paper "Why managers need an evolutionary theory of organizations". They suggested, among others, to manage business as a tribe (to create tribal identities for members' benefit), respect the diversity of culture within organisation (in order to bring a diversity of experiences and skills), and to balance wise monitoring and punishment acts.

### *The Systemic Perspective*

Although the Evolutionary and Proccesual theorists present quite nihilistic and sceptical views of the strategy, pupils of the Systemic perspective stand on the other side of the barricade. They believe in organizations and their capacity to plan and act effectively. There is something that differentiates them from the Classical perspective as well: Systemic theorists refuse to accept its rationality as anything more than just a "historically and culturally specific phenomena" and insist that those rationales of the strategy are "peculiar to particular sociological contexts" (Whittington, 2001, p. 26). They also argue that all previous approaches are based on a Western view of the world. Therefore, it is the only perspective that takes specific contexts into account and realises that the strategy that seems to be irrational in one situation and market might be perfectly effective and rational in another. Those 'specific contexts' include variables

such as class, professions, nations, states, families, and gender. Interestingly, not all cultures have this concept; according to Pascale, (1982) the Japanese do not even use the ‘corporate strategy’ term.

Whitley, one of the most known Systemic theorists, demonstrated in the example of Southeast Asia (1999) that forms of business may differ from each other because of the state, market, and familial structures. He concluded (1991, p. 24) that “different kinds of enterprise structures become feasible and successful in particular social contexts, especially where cultures are homogeneous and share strong boundaries with nation states.” As noted by Whittington, despite the fashionable talk about globalization, the local societies still matter and even the biggest multinational businesses can still retain strong local character. As Walker (1988, p. 395) wrote, General Motors “remains a thoroughly mid-western company”; IKEA recalls Sweden, and Apple is a reminder of California in their images and style of management.

There exist many definitions of strategy that were developed throughout the years. Some of them were intended to be as concise as possible, while others struggled to frame the widest range of our understanding of the concept of strategy. Johnson et al. (2014) demonstrated the importance of the market and stakeholders – in particular, the importance of meeting and fulfilling their needs. Authors introduce a strategy as “the long-term direction of an organisation” (2014, p. 4). Despite the compactness of this definition, it has two strong advantages. Firstly, according to authors, the long-term course of action includes both logical strategy and its incremental patterns. Secondly, it can include strategies that perceive the role of cooperation and those which emphasise competition and difference. Moreover, Johnson et al., further explored three elements of their definition (the long-term, direction and organisation):

- *The long-term.* Strategies are measured over the years (depending on the organisation it might be a decade or more), and they are emphasised by ‘the three-horizon framework’, which “suggests organisations should think of themselves as comprising three types of business or activity, defined by their ‘horizons’ in terms of year” (2014, p. 4) (See Figure 2). The first horizon (Horizon 1) stands for the dominant system, the current core activities, and represents “business as usual” (Boys, 2014, p. 213). According to Boys (2014), it leads to stagnation and decline in terms of profits (or any other organisation’s value), as it does not involve innovation. The second horizon (Horizon 2), however, implies some positive initiatives, which eventually becomes more effective than the ‘business as usual’ mentioned before. This particular point is often called the ‘innovator’s dilemma’. The concept of ‘innovator’s dilemma’ was designed by professor Clayton Christensen (2013) to describe the situation in which the organisation needs to decide whether to protect the core business or invest in the initiative and innovation. According to Boys (2014), this horizon may generate both crisis and opportunities. The third and last horizon, involves ideas for profits’ increase, for instance research projects, test-market pilots or development projects (Johnson et al., 2014, p. 6). It is a radical innovation that offers a new way of doing business. According to Johnson et al., the key point for this ‘three-horizon’ framework is that managers should focus on long-term activities rather than short-ones. “Strategy involves pushing out Horizon 1 as far as possible at the same time as looking to Horizons 2 and 3” (2014, p. 6).

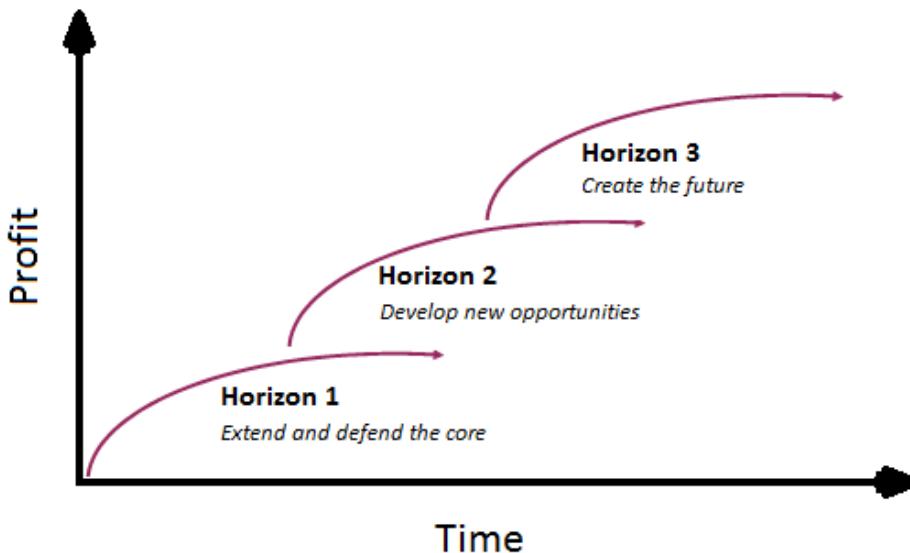


Figure 2. The Three Horizons of Innovation.

- *Strategic direction.* As claimed by Johnson et al., strategy direction “emerges as a coherent pattern over time” (2014, p. 6) and pursues a long-term trajectory of the organisation set by managers and entrepreneurs. This trajectory may differ due to long-term objectives and the nature of an organisation. The private-sector business, for instance, might consider maximizing profits as a main objective, while “public sector and charity organisations may set their strategic direction according to other objectives. For example, a sport club’s objective may be to move up from one league to a higher one.” (2014, p. 6).
- *Organisation.* Johnson et al. consider organisations as complex bodies, involved in many relationships – both internal and external. The former includes employees; people and groups different from each other, competitive, and driven by different motivations and views. The latter includes customers, suppliers, investors, and regulators.

Further research will inform the literature review section on operational processes and consumer purchase intention.

## Methodology

The chosen paradigm for this research is Phenomenology as it refers to understanding humans’ behaviour (Saunders et al, 2009). The research approach for this study is inductive as it emphasises moving from data to theory and forming a close understanding of the research context (2009).

The proposed project will conduct a test survey to a number of charity organisations from the UK and US (chosen due to their cause) examining to what extent they take advantage of social media and mobile applications in terms of acquiring donations. On this base, and on the criteria of geographical localization, skills and size of the organisation, there will be two charities chosen, one from the UK and one from the US.

The current project will be conducted using both quantitative and qualitative research methods to obtain a deep analysis of the problem in two chosen charity organisations. From this point, the project will be conducted in three stages.

The first aims to investigate strategies of both organisations. Therefore, qualitative in-depth interviews with key personals were chosen as the most effective method of exploring this issue. Interviewees will describe how they perceive a digital marketing strategy in their organisations, how they chose it, and how they think they will realise its goals.

The second stage will be based on a quantitative content analysis of the range of digital media channels currently utilised by organisations (with a focus on social media). This will allow evaluating and investigating operational processes in organisations. Therefore, on this phase of the project, we will have a picture of organisations' strategies and operational processes. In other words, we will gain knowledge about what those organisations *think they are doing* and what they are *actually doing* in terms of acquiring new donators via digital marketing and social media.

The third and final stage will complement this picture with donators' perception on charities' approaches. The impact of social media engagement on consumer purchase intention will be measured and examined though survey questionnaires sent to donators. Their e-mail addresses will be chosen from charities' electronic mailing and Facebook followers' lists.

In conclusion, those three stages of the research project will result in the framework of best practice in terms of acquiring new donators and strengthening the relationship between a digital brand (charity organisation) and a consumer (donator). Moreover, the use of these research methods will provide a triangulation of both data and sources (Denzin & Lincoln, 2011).

# CHAPTER 5

## Can social media be an effective tool for creating loyalty and community amongst micro firm cafes?

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### Introduction

The marketing literature has long observed that social media has potential be used in a strategic manner (eg. Baird and Parasnis, 2011; Mehta and Anand, 2012). However, how social media can be used in such a manner has been a much debated topic amongst academics and practitioners and there does not appear to be an agreed consensus. One of the biggest knowledge gap in social media literature, assert Tsimonis and Dimitraides (2014), is how it can be used to achieve and support marketing objectives and strategies

Many practitioners have resorted to using social media experimentally (Royle and Laing, 2014) or by copying competitors (Tsimonis and Dimitraides, 2014) but this comes with its own disadvantages, including issues such a competitor's strategy not being effective or transferable to another company or the high costs arising from inefficient experimenting. Larger companies can often overcome the issues that arise from experimentation due to their resources but small firms are typically less able to absorb such costs. Having fewer resources also makes small firms more vulnerable as they face more difficulties such as creating brand awareness, which research has shown helps with developing loyalty, and in turn, with generating more sales (Stokes, 2000).

These issues reiterate the importance of continuing research on social media; as more knowledge is gained, the social media gaps can be filled and this enables academics to support practitioners with their social media needs. The vulnerability of small firms, as well as their contribution the local and national economy, also reiterates the need to support small firms with their social media needs. Despite the acknowledgment small firms have different needs compared to medium sized or larger companies, small firms as they are often neglected area within social media literature. Much of the literature within social media is either intended for large organisations or is intended to be transferable to companies of all sizes (eg. Castronovo and Huang, 2012; Sashi, 2012; Gensler et al, 2013; Laroche et al, 2013). Small firms tend to be neglected in research about SME's and often are not distinguished between firms of other sizes, despite the acknowledgment that small firms have different needs compared to medium sized or larger companies. Small firms are essential for the health of the economy; they make up 96% of UK businesses and contribute to both the local and national economy (Ward and Rhodes, 2014).

The café industry was chosen because it is worth £1.45 billion to the UK economy (Mintel, 2015) and has trends and characteristics that make it highly suitable for this research. For example, this market is highly competitive. There are many cafes within the British high street and residential areas and as more non-specialist shops, such as McDonalds or Greggs, have started serving products similar to a cafe's offerings, this market is increasingly getting competitive. This is already a market where customers show low levels of loyalty, "bargain-hunting and promiscuous spending behaviour" according to Mintel (2015 page 1). In order to secure their survival, Mintel (2015) asserts that café's need to develop "deeper relationships to foster real loyalty" (Mintel,

2015 p1). Therefore, it is an industry where relationships, loyalty and possibly community are essential. Social media has proven to be effective communications tool (Eg. Nakara et al, 2012) and research has suggested that it may be effective for building relationships (Eg. Malthouse et al, 2014). As such, social media could potentially play an important role in café's marketing strategies. This makes the café industry a good market to study; it is a market that needs loyalty, is a highly competitive market and, because of its contribution, is a market that is important to the UK economy.

### **Literature Review**

Currently there is no agreed definition of social media but Kietzmann et al (2011) offer a concise definition; social media “employ mobile and web-based technologies to create highly interactive platforms via individuals and communities to share, co-create, discuss and modify user-generated content” (p241). This definition captures all the characteristics of social media described by various researchers (e.g. Drury, 2008; Michaleidou et al, 2011; Kim and Ko, 2012; McCann and Barlow, 2014). Social media has become an everyday part of life for consumers and has also greatly changed the way people communicate with one another (eg. Garcia-Medina and Correria Pereira, 2012; Tsimonis and Dimitriadis, 2014). Customers are not passive online, either; they regularly share, create content and engage in conversations online (Mangold and Faulds, 2009; Keitzmann et al, 2012; Durkin et al, 2013). Therefore, it is imperative that firms adapt their communication mediums so they are still able to reach out to, and stay relevant to, their consumers.

Academics such as, Castronovo and Huang (2012) and Tiago and Verissimo (2014) agree that social media's strength lies in communication and relationships. This strength would suggest that companies could use social media as a tool for building and maintaining relation and, and by extension, creating loyalty for the company. This belief that social media can be used to develop loyalty for business is a concept that has been explored by academics for some time (eg. Baird and Parasnis, 2011; Gensler et al, 2013). Though there is no agreed consensus on what activities help promote loyalty or how social media, research to date has shown a positive effect of social media on behavioural outcomes such as developing brand awareness, loyalty and more engagement with the business (eg. Hawkins and Vel, 2013).

Loyalty is an essential issue for companies; it is a source of competitive advantage and supports their sustainability and survival (Woodruff, 1997). These are especially important for small firms. Though price differentiation can be a source of loyalty (Curran and Healy, 2014), small firms cannot sustainably compete on price as larger firms will always have the advantage from economies of scales productions or being able to absorb the cost whilst waiting to push out the small firm from the market (Cavusgil et al, 2008). Curran and Healy (2014) stress that price should not be used to gain a customer's loyalty as customers can easily switch to another firm offering lower prices or when another company with attribute the customer prefers enters the market.

Curran and Healy (2014) note are different levels of loyalty, which affects the depth of commitment to a company or brand. They stress the importance of aiming for higher levels of loyalty to obtain a deeper level of commitment from customers. In light of the difficulties small firms have with competing against larger firms, it appears logical for small firms to aim for higher levels of loyalty. This research intends to explore this higher level of loyalty in relation to the cafe's customer's relationships and activities.

The insights obtained from this exploration will then feed into developing a model of best practise for café’s social media use.

According to Erdogmus and Cicek (2012) social media is “related to relationship marketing” (p1335). As the name would suggest, building relationships are paramount to relationship marketing, and this approach focuses on activities such as customer retention and “continuous customer contact” (Egan, 2011 p39 ). Kietzmann et al (2012) and Caers et al (2013) point out that building relationships are also very important in social media which, according to Ramsay (2010), is achieved through a communication strategy. This focus on building and developing connections would suggest that relationship marketing and social media marketing have similarities. In fact, the same principles that drive relationship marketing can be seen in social media relationship marketing. Both relationship marketing and social media marketing believe that the most effective ways to encourage sales and generate profits are by creating and nurturing relationships and customer orientated focus in their activities (Mangold and Faulds, 2009; Garcia-Medina and Correria Pereira, 2012). Aksoy et al (2008) explain this belief comes from “the main premise that customer retention is much more cost effective compared to customer acquisition” (p3). As such, both approaches have a long-term focus because they are aware of the time and committed needed to establish and develop relationships. It can be argued that both approaches are so similar in focus and method that they are the same, and not “related” as Erdogmus and Cicek (2012 p335) claim they are. It may also be argued that social media marketing is a branch within relationship marketing or that social media is a tool which relationship marketing can use, similar to advertising is used within the communications mix.

Whether a company chooses to recognise social media as a branch of relationship marketing or a tool for relationship marketing, social media’s advantage lies in its ability to provide a platform for engagement. Engaging with customers prevents consumers’ getting bored or losing interest in the brand (Singh and Sonnenburg, 2012). Engagement offers customers the chance to interact with the company and develop a relationship with them (Yan, 2011), which can result in brand loyalty (Mangold and Faulds, 2009; Yan, 2011; Kietzmann et al, 2012; Erdogmus and Ciciek, 2014; Cooper, 2014). Furthermore, social media also offers the chance for customers to interact with other users which helps create a community (Muniz and O’Guinn, 2001; Shen and Bisell, 2013). These can play an important role in a company’s marketing strategy as brand communities “carry out important tasks on behalf of the brand” such as “sharing information” and “perpetuating the history and culture of the brand” (Muniz and O’Guinn, 2001 p427). Brand communities also encourage loyalty from other members, further helping to establish a sense of loyalty to the brand.

This research will be using an interdisciplinary approach. It will be using elements of anthropology to better explain the concepts of loyalty and community within the context of social media and marketing for cafes. In particular, the branches of anthropology that will be used are business anthropology and social anthropology. Van Merrijk (2010) believes anthropology’s contribution to business is in providing “theories and methods to improve corporate functioning”(p26). Ryder (2004) believes that anthropology can help academics and practitioners to develop a deeper understanding of consumer motivations. He puts forward the view that our ‘inner systems’ (p352)- values, emotions, our needs derived from evolution - very much influence individual thinking , which in turn affects what brand a customer’s chooses to connect with or what brand they do not want to be associated with. Ryder explains that, though we may not realise

it, it “much of what we do [as people, as individuals] is to satisfy our deep needs... if brands, and those responsible for managing [these brands], lack the depth to reach for alignment with these ....drivers of our behaviour, those brands are effectively disconnected and drifting beyond the people they seek to influence” (p350).

The society of applied anthropology (2015) adds that anthropology can contribute to business by “finding and explaining patterns of behavior that impact strategies and tactics..[which] can be used to improve business operations”. The patterns this research wants to find and explain are about loyalty; patterns such as understanding consumers’ motivations for purchasing from a particular cafe, what extent they feel part of a group or community or whether their degree of involvement changed over time and does this have an implication on their loyalty levels. In turn the findings from these patterns can be aligned with the anthropology theories regarding the stages an individual goes through from becoming a member of a group to becoming a loyal member of a group.

## **Methodology**

The aim and objectives this research intends to answer can be seen below. The methodological strategies chosen for this research were taken based on the belief that they will best answer the research aims and objectives.

Aim; Can social media be an effective tool for creating loyalty and community amongst micro firm cafes?

Objectives;

Discern the cafes’ social media activities that develop loyalty amongst consumer, and identify what type of loyalty is established through activities.

Understand how the cafe’s activities create a sense of community

Examine the impact of community on loyalty to the café

To what extend does the consumers’ loyalty to the café impact upon their participation on the café’s social media pages? And does this have an impact upon the customer’s repeat business?

Create a model of best practice

## Philosophy

Ontology is a philosophical assumption about the reality of nature (Cresswell, 2007), and as such, will influence the ways in which “research questions are formulated and research is carried out” (Bryman and Bell, 2011 p23). This research is investigating issues within social media, consumer behaviour and behaviour of small firm owner/mangers where it can be argued there are more than one reality. Individuals’ have differing experiences and opinions which create different point of views. Therefore, this research requires an ontology that will allow for such differences.

The Constructionist approach will allow for such difference. Constructionism concentrates on “socially agreed understanding” because it believes there is no absolute truth (Jankowicz, 2005 p 116). It is not an approach concerned with using data to build on theory as it is with understanding phenomena in order to “predict future outcomes” (Jankowicz, 2005 p111), making it an appropriate ontology for achieving objective five (creating a model of best practice).

Once the research has selected how reality is viewed (ie. the ontology), the next step is to consider the epistemology to be taken. This refers to how the researcher views the nature of knowledge (Saunders et al, 2007). The epistemology selected for this research is phenomenology. It is interested in understanding behaviour and common experiences (Cresswell, 2007; Saunders et al, 2006; Bryman and Bell, 2011) and “focuses not on what appears, but how it appears” (Lewis and Staehler , 2010 p1). Phenomenology does not believe a reduction in interpretation is possible because it accepts that there are many interpretations of the same thing (Kafle, 2011).This acceptance of multiple realities and subjective experiences makes it relevant for this research, which aims to understand issues such what activities encourages loyalty (objective one) and examining the impact of community on loyalty to the café (objective 3).

### Research Design

Case studies are commonly used within business research (Bryman and Bell, 2011), in subject matters ranging from consumer behaviour (Eg. Cova and Cova, 2006) and social media usage (eg. Luo et al, 2013) and business networks . Subjects within a case study can be of an organisation, person, a location or even event and is the “intensive examination of a setting” (Bryman and Bell, 2011 p60). As a result, case studies are often used in exploratory research (Yon, 2014). The distinguishing feature of a case study design when compared to other research designs is the case study’s focus on identifying the features specific to the case (Bryman and Bell, 2011). Once this has been achieved the researcher can use the data collected for either theory–testing research or theory-building research (Dul and Hak, 2008).

Although a case study design typically uses one case (Bryman and Bell, 2011), this research will be using multiple case studies. This is a popular approach within business research and is particularly used within research related to social media (eg. Nakara etal, 2012; Durkin et al, 2013; Shen and Bissell, 2013). Noor (2008) would suggest this is due to the general critique of case studies for not being transferable or generalizable whilst multiple case studies can be used to asset with theory generation (Eisenhardt, 1989), and therefore result can be more transferable. Multiple cases studies typically give researchers the scope to “compare and contrast data” (Farquar, 2012 p42), to create “more compelling” evidence and in turn “enhance” a study’s transferability as well as rigour (Stavros and Westberg, 2009 p 317). Farquar (2012) notes that case studies are “anti-reductionist” (p104), making it appropriate for studies like this that an explorative approach. These characteristics make the case study design an appropriate for this research, which aims to understand and explore phenomena in detail.

Eisenhardt (1989) explains that an ‘ideal’ number of multiple case studies do not exist. The number is dependent on a number of factors, including the research aims and objectives and the availability or accessibility to participants, (Yin, 2014). Nevertheless, Eisenhardt (1989) does offer guidelines; she believes multiple case studies of less than four are not adequate enough to “generate theory with much complexity” (p545) but more than ten case studies may be hard for researcher due to the complexity and amount of data collected. Consequently, this research will aim for twelve case studies; the extra two cases will provide a ‘back-up’ role should there be any cases that does not produce the adequate data required for this research.

### Data type

Most of the research conducted on small firms have used a quantitative approach (e.g. Murphy and Ledwith , 2007; Elkouly et al, 2103;Thompson, 2013). Marketing research

has also mostly used quantitative data (eg. Cha, 2009; Chen, 2011; Laroche et al, 2013; Luo, 2013). It is true that results from quantitative research in these fields have contributed to knowledge; such as establishing owner-managers ‘resistance to change’ (Gray, 2002) and that brand communities can develop consumer loyalty (Laroche et al, 2013). However, quantitative research does have limitations. One such limitation Saunders et al (2007) would argue is that numbers cannot always convey significance or depth in the same way words can. Mason (1996) adds that quantitative data aims to generalise. Qualitative data, on the other hand, seeks to understand a particular context or issue (Bryman and Bell, 2011). The issue for this research is to gain a deeper insight into individual’s opinions and beliefs, which requires data that will give researchers the scope to further explore concepts, issues and circumstances (Creswell, 2007). Quantitative research may not be able to provide data with enough depth to achieve this.

Qualitative data aims in gaining a deeper understanding or insights of a phenomena (Patton, 2015; Creswell, 2007), making it more appropriate for this research. It uses a variety of data sources to understand a phenomena or a participant’s view of an issue, developing a better comprehension of the context and gives scope for a deeper analysis (Creswell, 2007). This aligns with a case study design, where an understanding of the context and a deeper analysis are characteristics of the design (Yin, 2009). Inductive approaches, another feature of this research, benefit from qualitative data’s ability to generate deeper insight to support its emergent data analysis (Jankowics, 2005).

#### Approach

A deductive reasoning is not typically used within qualitative research because, Flick (2014) would argue, it hampers qualitative research’s flexibility and potential for further analysis. Data in deductive reasoning is used to “test out or falsify a pre-existing theory” (Mason, 1996 p100). This is not usually the intentions of a qualitative research, where data is used to explore phenomena, either to identify connections or to conduct deeper or identify concepts (Hyde, 2000; Silverman, 2009). As such, qualitative data tends to use more inductive reasoning to “generate and test theory” (Mason, 1996 p100).

An inductive approach analyses collected data to develop “theoretical propositions or explanations” (Mason, 1996 p142) without the “restraint imposed by structured methodologies” (Thomas, 2006 p238). Therefore, allowing the data to shape the analysis and may help uncover new insights not considered in previous research. It is inductive reasoning’s ability to discover new patterns, links or even new phenomena (Bryman and Bell, 2011) that makes it attractive to researchers.

#### Sample

The “broadest” definition of sampling, according to Mason (1996), is the “principles and procedures used to identify chose and gain access to relevant units, which will be used for data generation by any method” (p83). Cochran (1977) asserts that sampling provides researchers with a variety of advantages. One such advantage is to help to increase accuracy of the data analysis as a smaller population enables “more careful supervision of field work and processing of results” (p2).

This research is interested in a population with certain characteristics (micro firm cafes that use social media and their customers, which Miles and Huberman (1994) would consider recruiting a homogenous sample and, therefore it is a purposive sampling strategy. This sample uses the judgment of the researcher(s) to identify subjects for a sample (Saunders et al, 2007). Saunders observes that this sample is not “considered to be statistically representative of the total population” (pp230). However, this is not an

issue for qualitative research as it does not try to be representative; instead it is more interested in people or events (Miles and Huberman, 1994; Ayres, 2007). In order for this sampling strategy to be effective, information rich subjects or cases must be selected (Patton 2002 in Saunders et al, 2007).

The samples selected for this research will be based on the characteristics which can be seen in the table below

Wanted characteristics from samples recruited for micro firm case studies
<ul style="list-style-type: none"> <li>• Lifestyle micro firm</li> <li>• Café industry</li> <li>• Active on at least one social media platform (ie. uses this platform everyday), which are Facebook, Twitter, Instagram or Pinterest</li> <li>• Business has been operation for at least six months</li> </ul>

Table 1

The strategy used for approaching customers will be a convenience strategy, so called because the researcher will not be targeting particular customers within the café. Instead, all customers are encouraged to fill in the questionnaire. The choice of sample strategy was determined due to practical issues; the managers were not keen on the researcher approaching customers and asking them to fill in a questionnaire. Managers thought customers may feel forced to answer the questionnaire and they were keen to avoid this. They were happy for the researcher to leave questionnaires at the café for customers to fill or to post a link to an online questionnaire. With regards to this accessibility issue, the convenience sample is the most practical choice.

This sample strategy has been criticised by many researcher for issues such as the possibility of under-representing or over-representing a particular group, making it difficult to generalise findings to a wider population (Williams, 2003). This type of strategy also raises the issue of how under-representing or over-representing a group could impact upon the findings. Despite the often heavy criticism directed towards convenience sampling (eg. Saunders et al, 2006; Bryman and Bell, 2011), it has been used in a various business research involving people's opinions or experiences (eg Kim and Ko, 2012; Durkin et al, 2013). It has to be considered that the choice for this research was either to have a convenience sample or not to use customers' opinions and experiences. As the latter would negatively impact upon achieving the aims and objectives, the option is to use a sampling strategy. It is essential that the possible impact of using a convenience sample is stated within data analysis.

Though this is a convenience sample frame, it has to be taken into account that those filling in the questionnaire are customers of the café being studied. Whether these customers are loyal customers, customers who only come to the café because the location is convenient or even first time customers, the answers gathered from them will provide valuable insight from a variety of perspectives.

#### Data collection

The use of multiple data collection methods is to assist with richer data collection. The use of different data collection methods is to assist with the collection of richer insights into a phenomenon as each data collection method offers something different, whether it is a different perspective from which to analyse data or helping to identify information that may not be noticeable in other methods (Axinn and Pearce, 2006). The data

collection methods used in this research will be semi-structured interviews, questionnaires and observation of social media activity and behaviour.

#### Semi structured interviews

This study is taking a phenomenological epistemology, which requires researchers to study how subjects “perceive... describe... feel... judge... remember... make sense of... and talk about” the phenomenon being studied (Patton, 2015 115). Interviews provide the scope for collecting such data as it allows researchers to probe deeper into an issue and obtain richer data, which is why this study will conduct interviews with the micro firms and its customers. Interviews, particularly semi-structured interviews, are a common data collection method within business research (Saunders et al, 2007) and are used especially in research that is interested in understanding phenomena as opposed to identifying it (eg. Mitchell and Imrie, 2011; Nakara et al, 2012; Durkin et al, 2013).

Adams (2010) explains interviews are similar to conversations in the sense that there is a two-way discussion and both interviewer and participant contribute to the discussion. This allows the researcher and the participant to explore a subject together and combine the knowledge of the other into the discussion. The added advantage of an interview is the immediate feedback; should the participant not understand the questions or if they have misinterpreted a question, the researcher is on hand to solve the issue (Saunders et al, 2007). Interviews conducted face-to-face or over the telephone have a further advantage of using external cues, such as body language or tone of voice, which may be useful when interpreting and analysing data.

#### Questionnaire

Customers will be asked to fill in a questionnaire. Interviews were the preferred method of data collection from customers, however, managers were not keen for this, explaining that they did not wish customers to feel obliged or forced to participate in interviews. Managers favoured questionnaires as customers would not feel under pressure to participate and they are less time-consuming than interviews for the customers. A questionnaire was also chosen for practical reasons. There will be twelve interviews to conduct with managers. This requires the use of a variety of resources, including putting aside time to interview managers, transcribing and analysing all the interviews separately before cross-examining them. The researcher would also need to do this for the interview with customer. Silverman (2013) highly suggests that researchers interview at least eight to ten people to obtain insight into a phenomenon through qualitative interviews. This would amount to at least ninety six interviews to conduct, transcribe and analyse. This puts an incredible amount of pressure onto the researcher doing a PhD, who typically will be conducting the interviews and analysis on their own. Therefore, practical issues and the need to adapt data collection approaches for access reasons have dictated the data collection methods for customers. After the interviews with the café managers have taken place, the questionnaires would be available online on the café’s social media pages (and their webpage, if applicable) and printed questionnaire will be available in the cafes. The latter may be more prove to be more successful as customers may fill in the questionnaire while waiting for their order or sitting in the café.

Due to the nature of questionnaires, there is a restriction on the depth of analysis that can be conducted. However, this can be overcome by using open-ended questionnaires which allow participants to write freely rather than tick a box. The answers can then be analysed like any other text within qualitative research, such as by inferring possible

reasons for the respondent's answers and patterns, whether from may be the literature, current trends in the environment or from other data collection conducted for the research (Creswell, 2007; Silverman, 2013).

There are advantages to using a questionnaire that would not have been possible with interviews. For example, questionnaires can potentially be filled in by a large amount of customers who may be loyal customers, people that come every so often or someone who has come to the café for the first time. This research wants to explore issues such as what activities develop loyalty amongst customers (objective one) or examining the impact of community on loyalty (objective 3). Interviews would only be conducted a limited number of people, whose background and opinions would influence the data analysed. Questionnaires, on the other hand, would give a better representation of the café's customers and therefore give a better insight into the success of the cafe's activities. The analysis from the questionnaires would provide complimentary information for the content analysis.

#### *Observation*

Observation is another data collection method this research will be using. Observation in this research refers to observing the social media activities and behaviours of both the cafes and its customers. Saunders et al (2007) agrees that using observation as an additional data collection method can be complimentary; this method can allow researchers to pick up on behaviour that the participants may not want to divulge or consider important enough share otherwise. The ability to identify such behaviours assists with framework development, and makes observation a suitable method for achieving objective five of this research (developing a model of best practise).

Observation is the “systematic observation, recording, description and interpretation of people’s behaviours” (p 282). It is not just interested in frequency of events (Saunders et al, 2007) but also interested in recording “the mood and affective components” (Yin, 2014 p74), which provides much of the context needed for interpreting behaviour (Solomon et al, 2006). This makes it highly appropriate for a study interested in understanding why people behave the way they do. Data collected using this method is likely to be both “descriptive” –data that focusses on the environment, mood, key participants, activities and frequency of events- and “narrative” (Saunders et al, 2007 p290). This research will most likely use the descriptive data as a basis. Used in combination with another data collection, such as an interview as this research will do, the descriptive and narrative data can enrich the research findings and analysis (Axinn and Pearce, 2006). As with other qualitative data collection methods, Yin (2014) recommends researchers undertaking observation to keep an open mind and avoid being selective about what information is used.

#### *Limitations*

As with any study, this research also has its limitations. These are mainly due to the methodology chosen, such as the case study design. Whilst a case study design enables the researcher to investigate phenomena in depth, it does mean that the results may not be as generalisable as a questionnaire with a large sample (Saunders et al, 2007). There is also be possibility that results may be only applicable to the case studies in question and not transferable to other industries (Bryman and Bell, 2007), or perhaps even other micro firm cafes. However, this study's aim are neither to make the results generalisable nor to make them transferable. The study aims to explore and understand how the social media behaviour of micro firm cafes have created -or were not able to

create- loyalty, build a brand and create a sense of community. Strommel and Wills (2004) acknowledges that every research has its limitations but adds that such limitations do not always diminish the contributions of a research. Acknowledging limitations ensures the research is transparent. Being aware of the limitations of a research can also provide a direction for further research (eg. Kim and Ko, 2011).

### **Contribution**

An intention of this research is to develop a model of best practice which would contribute in two ways. The main contribution is that this model could assist cafe's with their social media strategy. This could help increase their competitiveness and assist with survival, which are essential because of the value of these firms to the local and national economy. Small firms tend to play an important role in the community as well (Zontanos and Anderson, 2004), increasing their overall importance and increasing the need for supporting them.

The secondary contribution would be to the literature; the model can help to improve our understanding of effective social media strategy, such as identifying the effective social media practises and the reasons behind it. These insights could create a direction for further research. The qualitative approach taken is an additional value of this research; until recently most of the research on small firms and social media were quantitative. The qualitative data collected from managers will give better insight into the social media experiences of small firms, which can provide for a deeper analysis on social media or help to help uncover previously new knowledge (Cresswell, 2007).

An additional contribution of this research is that it will be interdisciplinary. Elements of business and social anthropology will be used within this study. The reasoning for using anthropology derives from the researcher's belief that when behaviour is understood from an anthropological perspective, it can be applied to a marketing context. The insight and knowledge obtained from the anthropological perspective can then be used to develop marketing strategies that mimic similar behavioral patterns shown in group membership and group loyalty to help encourage loyalty to a micro firm.

# CHAPTER 6

## The role and potential of ICTs in the tourism industry: the visitor attractions sector

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### Introduction

Tourism and information technology represent two of the largest industries worldwide. Modern tourism has proved to be a key driver for social and economic development as well as one of the fastest growing sectors. Latest figures from the World Tourism Organization (UNWTO 2015) show that tourism represents 10 per cent of the world gross domestic product and provides the creation of one in eleven jobs. Equally imperative but of different nature, the IT industry has taken giant steps in the wake of continuous innovation in the semiconductor sector. Since the 1970s, following the Moore's Law of increasing technology power and declining price, the processing capability of processors has grown exponentially and doubled almost every 18 months, making computers and electronic devices capable of unprecedented and innovative functions. In order to seize the magnitude of the sector, technology company Gartner forecasts that an overall US\$ 3.5 trillion will be spent in 2015 on IT worldwide and estimates a spend of nearly 4 trillion in 2019.

The set of new technologies and applications, continuously interacting with our activities and assisting in different areas of our lives, has fundamentally reshaped the way tourism-related information is created, used and distributed on many levels (Buhalis and Law 2008). Nevertheless, only in the past 15 years we have experienced the concrete change that ICTs generated by facilitating global interaction among consumers and operators. While these new technologies have reshaped the way tourism customers behave at every stage of consumption, ICTs also play a critical role for the competitiveness of tourism organisations and destinations as well as for the entire industry as a whole. Studies have demonstrated how ICTs have confirmed to represent a new emerging source of productivity (Torrent-Sellens 2012; Dolfsma and Soete 2006). ICTs are today a resource for organisations to be valued equally as important as manpower, capital and land and represent a specific type of capital input in which firms seriously invest in (Schreyer 2000).

The visitor attraction (VA) sector is certainly to be included within the sectors that are affected by the technological revolution of the tourism industry. As previously stated, the ICT sector is rapidly changing and continuously evolving the way tourism products are created, distributed and consumed. Visitor attractions (VAs) are a vital component of any country's tourism and entertainment industry as they can function as stimulus to travel to destinations. It has been identified by the author that not sufficient attention has been given in academia to the relationship between the whole range of ICTs and the VAs sector. Therefore, due to the relevance of the matter for the industry, a more comprehensive approach for investigating the role, the effects and the potential of ICTs is deemed necessary.

## **ICTs and Tourism**

In tourism academia, the history of science and technology has received limited consideration compared to other industries (Hjalager 2013). It was not until the early 1990s, when only a few studies were conducted on the combined theme of tourism and technologies, that due to the increasingly larger employment and diffusion of new technologies in tourism, several researchers identified the underlying importance of the integration of information and communication technologies into the tourism industry (Frew 2000; Kirk & Pine 1998). However, ICT has been a subject of studies comprising a widespread range of tourism areas and sectors such as airlines (Buhalis 2004), hotels (Neuhofer et al. 2015; Law et al. 2014; Ayeh et al. 2012), tourism intermediaries (Gupta and Utkarsh 2014; Bogdanovych and Berger 2006) visitor attractions and cultural tourism (Katsoni et al. 2014; Reino et al. 2007; Owen et al. 2006).

Tourism is characterized by being an information-intensive sector. It is inevitable that since ICTs became more accessible and widespread, tourism became one of the first grounds to incorporate those innovations and features offered by ICTs in their organisations. On the suppliers' side, the integration of ICT in tourism plays a crucial role for the competitiveness of not only tourism organisations but, more extensively, of entire destinations (Frew 2000). In fact destinations and operators, competing for attention in an increasingly challenging marketplace, can make use of the potential of ICTs as a highly dynamic and effective marketing and distribution tool (Buhalis and O'Connor 2005). Overall, ICT have enabled tourism operators in reducing costs, both administration and production ones, and improving service to customers by further reaching and better interacting with potential and habitual customers (Xiang et al. 2015). From all this information, it is evident that tourism technology is strongly related to the scientific, economic and social fields.

ICT has resulted in the foundation of new business models for tourism operators. Examples of companies that have been established on the pillars of the new industrial revolution, such as internet and the *sharing* factor, are the home rental Airbnb, travel-review and vertically integrated omnipresent giant TripAdvisor, transportation network company UBER and online travel companies Expedia and Booking.com. These companies are relatively new to tourism and constitute evidence of the evolution of the industry in the past twenty years. ICTs not only have assisted large companies to expand even wider their business, but also have enabled small and medium enterprises (SMEs) to enter markets and compete with larger players. The great flexibility and adaptability of ICTs facilitated the ease of information and its related aspects and is also the main driver for the reduction of management and assets costs.

ICTs' impact on users is well reflected in the greater access to information, prices, choice and convenience (Standing et al. 2014). On the demand side, travellers are empowered by the ease of accessibility to a multitude of resources (Werthner et al. 2015; Hjalager 2013). On one hand, users have the opportunity of searching and comparing simultaneously the information, on online travel agencies and tourism related websites (Couture et al. 2015; Buhalis and Law 2008). On the other one, users have the possibility to create and exchange useful information on social media and blogs at different stages of the decision-making process and product consumption (Milano et al. 2011; Xiang and Gretzel 2010). In fact the many ways the buyer is enabled to approach and consider a certain product, secondly to evaluate it, thus to purchase it and finally consume it, are all given by the extensive availability of

information and the autonomy in the use of information and also the means of purchasing methods accessible to the consumer. As a result, the tourism world becomes one of the richest database of information for operators and organisations as travel-related information is one the most searched type of information on the internet (Law et al. 2008).

## **Visitor Attractions and ICT**

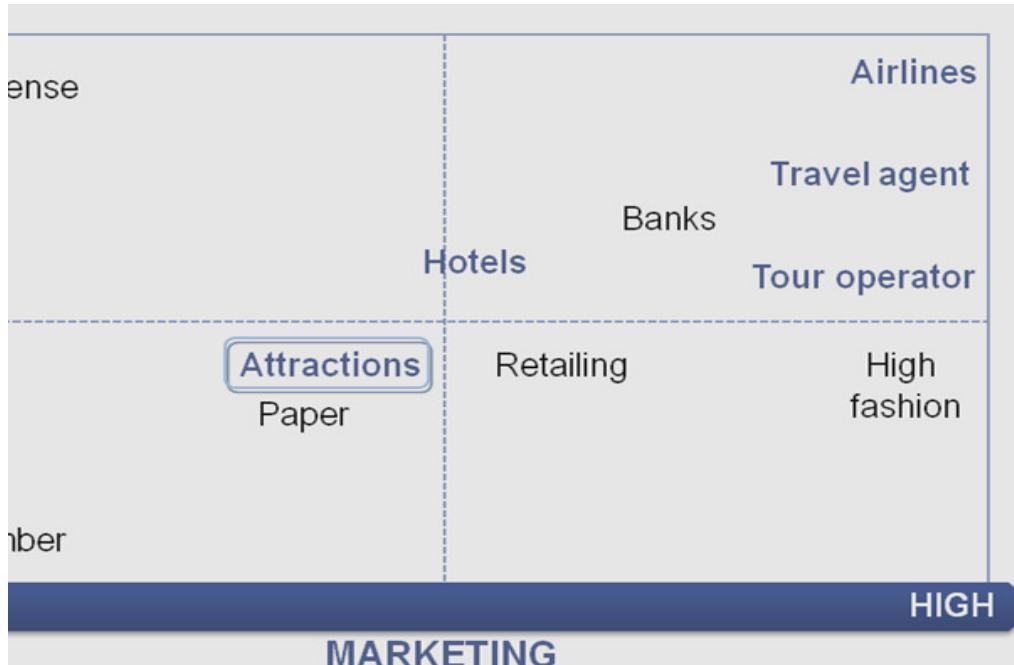
VAs consist of a range of natural, architectural, social, cultural and educational resources and assets and, for many tourists, they are the main reason for visiting a destination (Cooper et al. 2005). It has been also stated that without VAs, tourism would not even exist (Gunn 1994). In the broadest sense, it could be argued that a visitor attraction is anything that serves to entice visitors to a location, from special events to even distinctive local climate. As the boundaries for a unique definition of VAs are blurred, in this essay, a VA is defined as a permanent established location of diverse nature, with the purpose of allowing access for entertainment, interest, or education to visitors. Generally, it must be open to the public for most part of the year and should be capable of attracting day visitors or tourists as well as local residents. It can be a paid or free attraction and the size of a VA can also vary. A typical VA would be thus represented by: historic buildings, heritage centres, country parks and reserves, museums, galleries and amusement parks. In addition, retail outlets or other sporting and performing venues are not taken into consideration in this study

The attractions sector already makes use of ICTs. According to Benckendorff et al. (2014), ICT can be employed in three distinct areas by visitor organisations, with different functions:

1. Marketing and Sales: ICTs are used as tool for communication, sales and distribution to reach out visitors through the different electronic information channels
2. Management: ICTs are implemented with the aim of increasing efficiency of various operations such as admissions and coordination of visitors on site along with other operations such as security and maintenance.
3. Entertainment: ICT as creator of tourism product to enable visitor experience

With regard to the first group of ICTs employed for marketing and sales purposes, websites, social media, blogs and podcasts, e-commerce and other tools such customer relationship management systems (CRS) are the technologies that are typically used. Closed-circuit television systems (CCTV), electronic ticketing systems, virtual guides, near field communication (NFC) and global positioning systems (GPS), quick response (QR) codes and the use of mobile phones to support the use of such technologies, also play an important role in the daily operations and management at attractions. To conclude, through a range of hardware devices and software applications, visitor attractions have the technology at their disposal to create more personalised tourism experiences on several different levels (Neuhofer et al. 2015).

The third group of ICTs previously exposed, merits particular attention as, in the recent years, a large body of work was developed on the impact, role and value of the ICT in the tourist experience (Gretzel et al. 2015; Tussyadiah et al., 2009 and 2007). ICTs are



portrayed as the key enabler tool to connect and enhance tourists' experience; as it has progressively occurred in other sectors, attractions are increasing their use of ICT, not only confined to support management operations (Sheldon 1997) but also to be used primarily by tourists with the aim of enriching their own visitor's experience. Evidence of the synergy between ICT and attractions is given by the exhibition industry that has used smart information technology like the *beacons*, part of near field communication (NFC) technologies, which allow attendees to acquire information and access various services in an attempt to increase their involvement and satisfaction throughout the whole experience. Mobile devices and applications are increasingly being used by museums to guide and inform visitors; virtual and augmented reality can immerse visitors recreating and visualising past or imaginative environments and events with edutainment purposes (Reino et al. 2007); audio-guides supported by GPS based systems, QR codes and podcasts; merchandising and souvenirs created on the spot by 3D printers. Furthermore, the use of robotics and the *gamification*, the application of game playing, are good examples of how technological innovation has been applied to increase and encourage engagement in the sector.

Nevertheless, the impact of ITs in general may vary in relation to the different sectors within the tourism and travel industry. Benckendorff et al. (2014) created a matrix where the x and y axis represent, respectively, the production and the marketing areas of an organisation. To be able to establish a comparison within the tourism industry and its sectors, other industries of the economy have also been included in the model. The study suggests that some IT applications have an effect on the production side when technologies bring efficiency to product creation and service performance or when these are highly technical; other ITs impact on a higher scale marketing activities when, for instance, the product or service requires higher employment of marketing resources to reach consumers. It can be seen in Figure 1, that most of the travel industry sectors taken into consideration in the matrix are positioned on the highest level of the y axis.

Fig 1: Impact of IT on organisations' production and marketing in tourism and comparison with other industries (Benckendorff et al., 2014)

It is noteworthy to observe that visitor attractions are placed in the quadrant least impacted by IT. The sector is highly fragmented and mostly composed of small operators; if, on one side, some large operators such as theme parks and national galleries employ comprehensively ITs and ICTs, on the other side just as many more natural attractions and SMEs would barely account technologies in their modus operandi. As a final remark, ITs are considered to be rooted in the attractions sector product as much as in the paper industry, an established manufacturing whose functions and product are not affected by the most recent innovations in IT. It is also stated by the authors of the matrix, that the attractions sector is difficult to position, as some attractions heavily rely on ITs and ICTs, for instance theme parks, while others scarcely make use of those technologies (e.g. natural attractions such as parks). Therefore, it is evident that the attraction sector is a complicated one and deserves particular attention.

### The case of Scotland

Scotland's tourism sector is one of the country's key economic contributors with overnight visitors generating over £4.5bn annually and day visitors contributing £6.2bn in 2011 (The Scottish Tourism Alliance 2012). Visitor attractions play a vital role in the wider tourism industry in Scotland (Garrod et al. 2002). The Scottish visitor attraction sector is dominated by small-medium sized enterprises and is defined by Connell, Page and Meyer (2015), as a highly seasonal sector. It also faces a few internal and external threats such as increasing competition, from both overseas tourism markets and domestic trends of leisure activities such as sport and shopping (Garrod et al. 2006). Previous research have also shown "limited management information systems, naïve forecasting and poor business planning" in the attractions' sector (Lennon 2004, p.338). According to Lennon et al. (2001), Scottish visitor attractions are generally falling behind in terms of enticing visitors. It must be said that the local sector is mainly composed of small and medium operators; in year 2000, the number of VAs in Scotland was estimated to around one thousand (Fyall et al. 2001).

According to the annual study, the Visitor Attraction Monitor (VAM), conducted by the Moffat Centre for Travel and Tourism Business Development, visitor numbers to Scotland's main tourism attractions accounted 55 million in 2014, an increase of only 3.3% compared to 2013. The study takes into consideration 687 tourist sites, of which 333 are free and 354 are paid. Highlights are that the most popular destinations in Scotland are free admission attractions, which receive more than twice as many visitors as those with entry fees. The National Museum of Scotland in Edinburgh was the number one free attraction in 2014 with more than 1.6 million visitors while Edinburgh Castle proves itself to be the most popular paid attraction with nearly 1.5 million visitors in 2014. Six free attractions reached one million visitors, while only one paid attraction did, the above mentioned Edinburgh Castle. With regard to scale, over 500 attractions receive less than 50,000 visitors a year and every category within this volume of visits indicated a decrease or minimal increase compared to the previous year. It is worth to mention that the category of attractions welcoming fewer than 5,000 visitors represent one quarter of the total sample, and attracted just 1% of the total visits. Some classifications, for examples forts and castles, industrial/ work places and Scottish crafts/ retail attractions, have shown very static trends and, in some cases, a significant decrease in terms of visitors numbers over the years. To conclude, in 2014, free

admission attractions received almost twice as many visits as paid admission attractions, showing a tendency for visitors to value price as an important factor.

From a deeper look on the use of ICTs in the Scottish VAs sector, the VAM 2014 reports that almost all attractions have a web presence with either a website (63% of sample) and social media (Facebook 94%; Twitter 88%; YouTube 79%). The national survey that collects information on domestic travellers in Great Britain, calculated that 76% of trips were booked online. All type of online channels through which the booking was made had an increase in 2014; in all cases the volume of trips booked online has doubled since 2006 has experienced a steady non-stop surge year by year (TNS 2014). Another interesting aspect emerging from this data is that nearly three quarters of holiday trips (74%) were booked online. To conclude, shorter holidays were more likely to have been booked online than longer ones (77% versus 69%). As almost 80% of the visits to VAs are generated by locals, Scottish and UK visitors, the above statistics highlighting the importance of the online channels suggest that adequate attention should be given by attractions operators to their potential visitors' trip planning behaviour. To conclude, a recent initiative was taken by Digital Tourism Scotland (DTS) as the result of a new partnership programme, which has been created by various local government bodies to assist tourism operators to embrace ICTs. Annual conferences and tourism workshops will be held until 2018, to guide Scottish businesses to integrate ICTs in their operations and strategies.

### **Conclusions and future research**

The diffusion information and communication technologies have changed the structure and dynamics of the tourism industry. Nevertheless, the employment of ICTs seems overlooked by some sectors of the tourism industry, like the visitor attractions sector. From previous research, the reasons for this may be found in the scarcity of financial resources and some degree of limited skills of management and adaptation to change. It is imperative for the VA sector, in order not to lag behind its competitors or under other external pressures, to consider undertaking or outsourcing further research as the amount of information on the topic for Scotland is relatively scarce. As SMEs represent the majority of tourism businesses in Scotland, it would be relevant to investigate the attitude of small and medium VA operators towards the employment of ICTs. Similarly, a different approach that looks at the consumers' side in terms of preferences and attitude towards the use of ICTs when considering visiting VAs, could be also taken into consideration. A benchmarking study to compare the same sector in other geographical areas could also be beneficial to comprehend the state of the industry for Scotland. It is also appropriate to mention the prospective relevance of generations Y and Z and their involvement in further research, as they represent the most active users in terms of ICTs interaction and account today for 20% of international tourism. The perception is that the potential of the use of ICTs for VAs is high and operators, especially SMEs, could take advantage of the opportunities offered by technological innovation.

# CHAPTER 7

## **‘Luxury Malaysia’ Campaign: an initiative by the Malaysian Government in turning Malaysia into a luxury retail destination.**

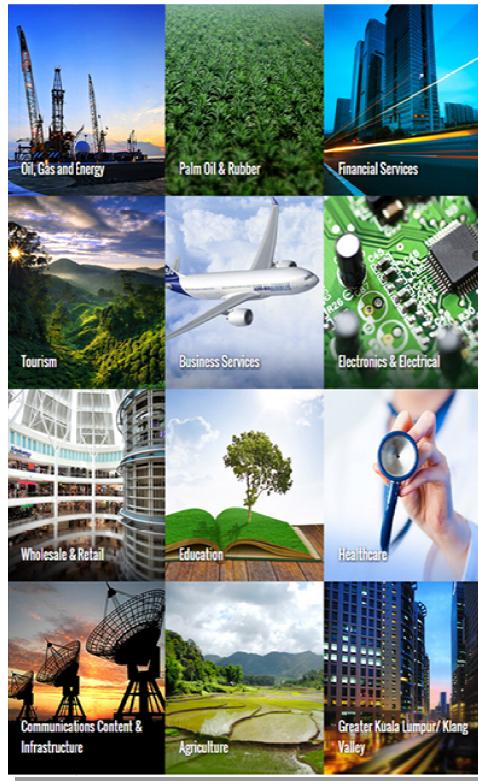
Noor Sabaruddin, Glasgow Caledonian University

### **Introduction**

The ‘Luxury Malaysia’ campaign is a tourism product launched in February 2012 by the previous Malaysian Minister of Tourism, Tan Sri Dato’ Sri Dr. Ng Yen Yen with the aim to rebrand Malaysia as a luxury retail destination (Oxford Business Group, 2012; PricewaterhouseCoopers, 2012) as well as to increase tourist spending by targeting high-income markets around the world (Oxford Business Group, 2012). Aris Anuar *et al.* (2013) highlighted that Malaysia’s seriousness in wanting to become a luxury retail destination could be reflected in the planning and tourism development in the latest Economic Transformation Programme (ETP) that was launched on 25 September 2010 (PEMANDU, 2013).

The ETP as announced in the Tenth Malaysia Plan (2011-2015) (PEMANDU, 2011) is a programme run by the Performance Management and Delivery Unit (PEMANDU) to drive economic development in turning Malaysia into a high income country by year 2020 (Aris Anuar *et al.* 2013; Bhuiyan *et al.* 2013; Nair *et al.* 2014). ETP are built upon selected National Key Economic Areas (NKEAs) and comprises of twelve selected sectors of economic opportunity for the private sector- for the purposes of driving Malaysia towards a high-income status and global competitiveness (PEMANDU, 2013). The twelve selected sectors are: (i) Oil, gas, and energy; (ii) Palm oil, and Rubber; (iii) Financial Services; (iv) Tourism; (v) Business Services; (vi) Electronics, and Electrical; (vii) Wholesale, and Retail; (viii) Education; (ix) Healthcare; (x) Communications Content, and Infrastructure; (xi) Agriculture; and (xii) Greater Kuala Lumpur / Klang Valley (PEMANDU, 2013). These twelve NKEAs are significant in their Gross National Income (GNI) contribution and are being prioritised and supported by the government in the form of funding, top talent, and Prime Ministerial attention (PEMANDU, 2011).

Figure 1.1 The 12 National Key Economic Areas (NKEAs)



Source: Performance Management & Delivery Unit (PEMANDU, 2013)

Table 1.1 Tourism National Key Economic Area (NKEA)

<b>Tourism NKEA / Component</b>	<b>12 Entry Point Projects (EPPs)</b>
<b>Affordable Luxury (shopping)</b>	1) Duty-free for wider range of goods 2) Bukit Bintang-Kuala Lumpur City Centre as premier shopping district 3) 3 new premium outlets (discounted luxury items)
<b>Family Fun</b>	4) Develop an Eco nature Integrated Resort 5) Straits Riviera Cruise playground for high-end cruise and urban redevelopment of port landing areas
<b>Events, Entertainment, Spa and Sports</b>	6) Bid for more international events 7) Establish dedicated entertainment zones 8) Target Spa and Sports (golf, angling) tourism
<b>Business Tourism</b>	9) Establish Malaysia as a leading Meetings, Incentives, Conferences, and Exhibitions (M.I.C.E) destinations

<b>Nature Adventure</b>	10a) Establish Malaysia as the pre-eminent global biodiversity hub 10b) Rainforest and Marine Discovery Centres (together with parks and gardens) 10c) New and enhanced live biodiversity sites
11) Connectivity (greater focus on medium connectivity to support growth)	
12) Hotels (ensure adequate supply with better mix, better rates)	

Source: Malaysian Investment Development Authority (MIDA, 2012), Tourism Malaysia (2012a)

### Discussion

Under the ETP, the Tourism NKEA or component is built upon twelve entry point projects (EPPs) (Aris Anuar *et al.* 2013), across five themes: (i) Affordable Luxury; (ii) Nature Adventure; (iii) Family Fun; (iv) Events, Entertainment, Spa and Sports; and (v) Business Tourism (Bhuiyan *et al.* 2013; Nair *et al.* 2014; PEMANDU, 2011). Under the Affordable Luxury segment, there are three EPPs proposed concerned with the affordable luxury segment (Oxford Business Group, 2012; Tourism Malaysia, 2012a): (i) positioning Malaysia as a duty-free shopping destination; (ii) turning Kuala Lumpur City Centre (KLCC)-Bukit Bintang area as a shopping precinct; and (iii) establishing three new premium outlets in Malaysia (Bhuiyan *et al.* 2013; Nair *et al.* 2014; PEMANDU, 2011).

Table 1.2 Tourism National Key Economic Area (NKEA) - Affordable Luxury Component

<b>Tourism NKEA / Component</b>	<b>3 Entry Point Projects (EPPs)</b>
<b>Affordable Luxury (shopping)</b>	1) Duty-free for wider range of goods 2) Bukit Bintang-Kuala Lumpur City Centre as premier shopping district 3) 3 new premium outlets (discounted luxury items)

Source: Malaysian Investment Development Authority (MIDA, 2012), Tourism Malaysia (2012a)

Affordable Luxury or shopping focuses solely on shopping (Tourism Malaysia, 2012a) and is one of the augmented tourism products and services along with nature adventure or ecotourism, family fun, integrated resorts, and major events and business tourism (Pemandu, 2011). Below are the details for each entry point projects (EPPs):

#### The first Entry Point Project (EPP)

The first experience is the duty free shopping, luxury brands products are tax exempted in Malaysia, except for five categories of products: cars, glass and pyrex, cigarettes, alcohol, and chocolates (Tourism Malaysia, 2012a). The first EPP is to position Malaysia as a duty-free shopping destination for tourist goods, and it was the main reason for the government's abolition of import duties in early 2011 (Oxford Business Group, 2012). As reported by PEMANDU (2011), categories of goods proposed in the 2010 NKEA labs for duty exemption were: cosmetics and perfumes, leather goods, textiles, apparel and clothing, footwear, headgear, jewellery excluding coins, electrical goods, and toys. The abolishment of import duties for 328 items under the above

categories was announced in the 2011 Budget by the Prime Minister (PEMANDU, 2011). While the government will lose an estimated RM630 million (\$203.2 million) in import tax revenues by 2020 as a result of this change, it expects to earn an additional RM780 million (\$251.6 million) in corporate taxes over the same period as new companies set up shop in Malaysia (Oxford Business Group, 2012). ETP Annual Report 2013 mentioned that promotional activities in creating awareness include: Kuala Lumpur Fashion Weekend, Duty-Free Roadshows to Kuala Lumpur, Penang, Johor Baru and Kota Kinabalu, and seminar and presentations to British brand owners and principals to encourage their presence in Malaysia (PEMANDU, 2013).

#### The second Entry Point Project (EPP)

The second EPP involves integrating and formalising the Kuala Lumpur-Bukit Bintang area as a shopping destination (Oxford Business Group, 2012). According to PEMANDU (2011), the Malaysian Ministry of Tourism is driving this initiative via creating better pedestrian connectivity, increasing commercial mix, and improving streetscaping. As a result, the Kuala Lumpur-Bukit Bintang area will be developed into as a premier shopping zone in Malaysia (Bhuiyan et al. 2013). Two key points highlighted under the second EPP are: collaborative efforts between the major malls in the area in organising integrated events; and providing seamless connectivity between shopping malls, offices, and hotels in the area. In addition to the above, the second EPP has facilitated the establishment of The Bukit Bintang-Kuala Lumpur City Centre (KLCC) Tourism Association that is responsible in making the designated area as a major tourist destination (Oxford Business Group, 2012; PEMANDU, 2011).

#### The third Entry Point Project (EPP)

The third EPP involves establishing premium outlets in Malaysia which offers discounted luxury items (Oxford Business Group, 2012; PEMANDU, 2011; Nair et al. 2014) in order to drive higher tourist volume, increase retail spend and food and beverages sales, and higher hotel occupancy rates (PEMANDU, 2011). This particular project is seen to commensurate Malaysia's tourism aspiration as a top shopping destination in Asia (Bhuiyan et al. 2013). As per location for the above EPP, there are three locations identified: Iskandar Malaysia in Johor, Sepang, and Penang (Oxford Business Group, 2012).

Table 1.3 Key Summary of Tourism National Key Economic Area (NKEA) - Affordable Luxury

Tourism NKEA / Component	3 Entry Point Projects (EPPs)	Summary
Affordable Luxury (shopping)	1) Duty-free for wider range of goods	Abolition of import duties for 328 items in early 2011
	2) Bukit Bintang-Kuala Lumpur City Centre as premier shopping district	Created in order to map the designated area as a shopping destination- via collaborative efforts, and improving connectivity in the area
	3) 3 new premium outlets (discounted luxury items)	Established to generate income from tourism activities

Source: PEMANDU (2011), Oxford Business Group (2012), Tourism Malaysia (2012a)

Under the Luxury Malaysia campaign, the Malaysian government has also abolished the import duties on luxury items such as apparel, shoes, jewellery, handbags and perfumes (PEMANDU, 2014). As a result of low import duties on luxury goods (Asia News Network, 2014), a number of new players has entered the Malaysian luxury market (Oxford Business Group; 2012, PricewaterhouseCoopers, 2012) such as Prada, Giorgio Armani, Chanel, Van Cleef & Arpels, Cartier, Jimmy Choo, Burberry, Bulgari, Hermès, Louis Vuitton, and Rolex (Oxford Business Group, 2012). They are relatively recent additions in taking advantage of the country's duty free status (Oxford Business Group, 2012). Other than high-end fashion, the Luxury Malaysia campaign also focuses on becoming a destination for high-end hotel brands; names in the pipeline include Armani Hotels & Resorts, Bulgari Hotels & Resorts, and Palazzo Versace (Oxford Business Group, 2012).

It was announced in The 2014 Budget Speech by Najib Razak (Malaysian Prime Minister and Minister of Finance) that as part of invigorating economic activities is to promote the tourism sector (Prime Minister's Office of Malaysia, 2013). To further promote Malaysia as a preferred tourist destination, the government is continuing encouraging investments in new 4 and 5-star hotels as this is a measure in ensuring sufficient supply of international standard accommodation and increase tourist arrivals, specifically from the luxury and high-spending category (Prime Minister's Office of Malaysia, 2013). In order to support this, the government also has proposed the application period for Pioneer Status and Investment Tax Allowance incentives be extended for another three years until 31 December 2016 (Prime Minister's Office of Malaysia, 2013). Supportive government policies have attracted foreign investors to Malaysia. The Malaysian Investment Development Authority (MIDA) is the government's principal agency for the promotion of the manufacturing and services sectors in Malaysia (MIDA, 2015). There are three government policies for attracting foreign investors to Malaysia: Liberal Equity Policy, Employment of Expatriates, and Attractive Tax Incentives (MIDA, 2015). "Liberal Equity Policy allows foreign investors to hold 100% of the equity in all investments in new projects as well as investments in expansion or diversification projects by existing companies irrespective of the level of exports and without excluding any product or activity; Employment of Expatriates allows foreign companies in the manufacturing sector to employ expatriates where certain skills are not available in Malaysia; and Attractive Tax Incentives consists of six main incentives: Pioneer Status, Investment Tax Allowance, Reinvestment Allowance, Incentives for High Technology Industries, Incentives for Strategic Projects, and Incentives for the Setting-up of International/Regional Service-based Operations" (MIDA, 2015).

With regards to infrastructure and events to support the Luxury Malaysia campaign, improving the transport infrastructure in the most popular shopping areas is also a major focal point (Oxford Business Group, 2012). In 2011, the state announced a plan to spend RM50 million (\$16.1 million) on shaded walkaways in Bukit Bintang, one of Kuala Lumpur's busiest shopping areas (Oxford Business Group, 2012). As for events to support the campaign, the government and the private sector have collaborated a series of festivals, events and performances to attract high-spending visitors (Oxford Business Group, 2012). Examples of events are: the Malaysia International Shoe Festival, Megasale Carnival, the Islamic Fashion Festival, and 'A Journey through Time'- a luxury watch and jewellery festival which is the largest luxury watch retail

gathering in Asia as well as Formula 1 Malaysia Grand Prix, the Contemporary Art Tourism Festival and a number of golf tournaments including the CIMB Asia Pacific Classic Malaysia Tournament and the Maybank Malaysia Open (Oxford Business Group, 2012). All these special activities or events focus solely on luxury products and events (Tourism Malaysia 2012a; 2012b).

The 2015 Budget Speech was released in October 2014 focusing on the people's economy and consisting of seven strategies: strengthening economic growth, enhancing fiscal governance, developing human capital and entrepreneurship, advancing *Bumiputera* (indigenous Malaysians) agenda, upholding role of women, developing national youth transformation programme, and prioritising well-being of Malaysians (Prime Minister's Office of Malaysia ,2014). In strengthening economic growth, there are 14 measures in plan and one of the measures are boosting tourism industry- Year 2015 is the Year of Festivals in which the Malaysian government is aiming to attract 29.4 million foreign tourist arrivals with expected income of RM89 billion (approximately GBP 17 billion) as well as RM 316 million (approximately GBP 59 million) is allocated for various programmes under the Ministry of Tourism and Culture (Prime Minister's Office of Malaysia, 2014).As mentioned by the previous Malaysian Minister of Tourism, Tan Sri Dato' Sri Dr. Ng Yen Yen, "Luxury Malaysia campaign aims to attract tourists who stay longer and who have higher spending power" (The Star Online, 2010). As such, the campaign is tailored to offer a complete high-end holiday experiences, and that includes high-end fashion (luxury fashion). As part of the campaign, The Malaysian Fashion Week 2014 was held in October together with trade exhibition and trade fashion shows: The Malaysia Fashion Showcase and Mercedes-Benz STYLO Asia Fashion Week (INTRADE Malaysia, 2014). The Malaysia Fashion Showcase (MFS) provides a platform for Malaysian established and emerging designers with collections from Islamic fashion, office and casual wear to high fashion (INTRADE Malaysia, 2014). On the other hand, The Mercedes-Benz STYLO Asia Fashion Week 2014 was the first Mercedes-Benz Fashion Week in South East Asia in which the event saw a great fusion of Malaysian, Asian, and Western influences (INTRADE Malaysia, 2014). The Islamic Fashion Festival (IFF) is part of an on-going initiative to position Malaysia as a luxurious holiday destination (Tourism Malaysia, 2012b).

## **Conclusion**

Based from the above, it could be concluded that the Malaysian government has implemented a wide range of policies since the launching of the 'Luxury Malaysia' campaign in 2012. As mentioned previously, the campaign has successfully attracted foreign names into the country and indirectly assists the economic growth. It could be concluded that the initiatives established by the Malaysian government is proactive as well as systematic.

# CHAPTER 8

## The Global Film Industry

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Hollywood, as well as being a place in California, is a global standard. For millions of people around the world the products generated by that conglomerate of companies which we call Hollywood represent all that an actual movie is (or should be). For these same people, the other film products are, in essence, sub-standard. Even those films that arouse great interest from specific audiences or in a particular geographical scope are perceived as “special” or “alternative” on a global scale. For instance, the film *Ocho apellidos vascos* (*A Spanish Affair*, Emilio Martínez-Lázaro, 2014) was a huge success in Spain. In fact, it became the most-watched Spanish film in history in Spain. At the end of 2014, the film had almost ten million viewers (in a 46 million country) and around 55 million euros raised (FAPAE, 2015, p. 56). However, it was basically a local hit. The film did not work abroad to the same extent, nor was intended. The context in which the movie takes place is so specific that only makes sense for local viewers (or, in any case, for viewers who know the Spanish context). To give just one example, few people outside Spain realise that the colours of the film’s poster are those of the Basque Country’s flag. Even the very title of the film (literally, *Eight Basque Surnames*), which is a kind of joke for any Spanish viewer, sounds quite odd for the rest of the world.

By contrast, *The Hobbit* (Peter Jackson, 2012-2014) was a global hit. This film, or better this film series, had a great success not only in the place where it was filmed, New Zealand, but worldwide. Indeed, this movie is not actually a New Zealand movie. It is a Hollywood movie, a film product from the biggest film industry in the world and pretty much the only one that is truly global. Millions of people worldwide, in very different countries, from very diverse cultures and contexts, are keen to see Hollywood movies, are able to understand those movies and, most important, are able to enjoy them. That means that Hollywood is a context itself. Obviously this is a longstanding phenomenon, but the fact is that it has not stopped spreading in recent years, making it one of the most evident signs of globalization and cultural homogenization. In my opinion, this question should not be overlooked, since for a good number of people (not for everybody, fortunately) Hollywood movies and TV series will be the most intense narrative experiences that they possibly ever will have. But apart from cultural considerations, film industry is a business, and a very important one for a country like the United States whose economy depends largely on Intellectual Property based industries. And, of course, filmmaking is one of the oldest and most prominent sectors among those industries.

Motion Picture Association of America (MPAA) is a trade association that represents the six major Hollywood studios: Walt Disney Studios Motion Pictures; Paramount Pictures Corporation; Sony Pictures Entertainment Inc.; Twentieth Century Fox Film Corporation; Universal City Studios LLC; and Warner Bros. Entertainment Inc. These six majors film studios are actually media conglomerates whose various film production and distribution subsidiaries collectively command approximately 80 to 85 per cent of U.S. and Canadian box office revenue; although if one adds the first two mini-majors,

Lions Gate Entertainment and The Weinstein Company, the percentage rises to over 90% (Nash Information Services, 2016). Among many other things, MPAA produces an annual report on the state and trends of the film business in the United States and around the world. According to MPAA (2015) report, “global box office for all films released in each country around the world reached \$36.4 billion in 2014, up 1% over 2013’s total, due to an increase in international box office (\$26 billion). Growth was driven primarily by the Asia Pacific region (+12%). Chinese box office (\$4.8 billion) increased 34% in 2014” (p. 2). In line with this revenue growth, the report notes that “cinemas screen increased by 6% worldwide in 2014 to over 142,000, due in large part to continued double digit growth in the Asia Pacific region (+15%). Over 90% of the world’s cinema screens are now digital” (MPAA, 2015, p. 2). Thus, contrary to what might appear from an American or European perspective, film business is growing on a global scale, mainly due to Asian emerging markets. By contrast, “in 2014, U.S./Canada box office was \$10.4 billion, down 5% from \$10.9 billion in 2013” (MPAA, 2015, p. 2) and there have also been “decreases in larger European markets such as Germany (-7%) and the U.K. (-1%)” (p. 5).

In order to learn more about how the current film industry works, let’s back to the movie that will serve us as an example. *The Hobbit* trilogy, co-written and directed by Peter Jackson, is a typical product of Hollywood that has led a film version of the book by J. R. R. Tolkien, at least in theory, to millions of viewers worldwide. This movie series was released in three consecutive years (2012, 2013 and 2014) with the subtitles *An Unexpected Journey*, *The Desolation of Smaug*, and *The Battle of the Five Armies*, respectively. It was filmed in 3D and has a total length of 474 minutes (this is, nearly eight hours; nine if we consider the extended versions published in Blu-ray Disc). The overall budget of the three movies was estimated to be \$750 million (Nash Information Services, 2015). The premiere of each film, preceded by a massive promotion as usual in these cases, raised great expectations among the global media, got a resounding box office success and was a great deal for their promoters. In fact, the series grossed nearly three billion dollars at the box office worldwide (Nash Information Services, 2015), besides it generated many other incomes through Blu-ray sales, broadcast rights, merchandising, video games, etc. Furthermore, *The Hobbit* trilogy was presented as a prequel of the hit movie series *The Lord of the Rings*. Also directed by Peter Jackson and released in 2001 to 2003, *The Lord of the Rings* is probably the highest grossing film trilogy of all time worldwide. Thus, *The Hobbit* trilogy has to be considered part of *Lord of the Rings* franchise.

In general, reviews of Jackson’s *Hobbit* were quite positive. Most of them highlighted the movies’ technical quality and the performance of Martin Freeman in the role as Bilbo Baggins. However, reviews were not so good when they took into account specifically the issue of the adaptation of Tolkien’s work. One aspect repeatedly commented and criticized by some reviewers was the trilogy format itself and its excessive length in relation to the original book. The underlying question was as follows: Does it make sense to make three films, of nearly eight hours long, from a book of three hundred pages? A good example of that kind of review is the one published by Robbie Collin in *The Telegraph* with the quite eloquent title “How Peter Jackson ruined *The Hobbit*”. According to Collin (2014) “the overriding problem . . . is that muddled perspective: the story has been bulked out with material that belongs nowhere near it. There are the much-touted additional details from Tolkien apocrypha, written in a florid, high-fantasy tone and from a sweeping perspective completely at odds with *The Hobbit*, alongside bonus characters, cartoonish violence, double-entendre

and toilet humour from the pens of Jackson and his co-writers.” I basically agree with that view. Yet my aim here is not to make a comparison between the film and the novel in order to examine how the adaptation works out. Rather, I would like to consider on why of the adaptation that has been actually carried out. I must confess that I cannot help feeling some kind of compassion for the fans of *The Hobbit* movies when I read certain comments and opinions on the reasons for any shift or addition in the film version. Especially when the discussion is couched in terms of narrative relevance, that is, when it is argued that the shifts and additions responding to reasons of filmic narrative flow, or even when it is argued that those additions solve a number of contradictions in Tolkien’s book. Which, in a way, is to say that these changes would come to improve the book (see, for instance, Olsen, 2013). In my opinion, the reasons why the film series is as it is have nothing to do with specifically narrative issues, or at least not too much; nor with one particular author’s interpretation of another’s work. In the end, all comes down to the way in which the present Hollywood industry actually is.

To understand how Hollywood is today one must go back to 1999, when Napster, the first peer-to-peer service to share music files through the Internet, was launched. As it is known, the subsequent drop in CD sales forced a rethink of music industry. But Napster was just a precedent: in 2001 was launched the first version of BitTorrent, a protocol for the practice of peer-to-peer file sharing. From that moment, the number of people who shared and downloaded movies did not stop growing. Websites specializing in this type of downloads proliferated and became a business covered by a sort of international legal limbo. Suddenly, any movie was available with just a few clicks without having to pay for it. As happened in the 50s with the dazzling success of TV in the United States, the Internet has led to a restructuring of the film industry. Obviously, Hollywood is very concerned about how to make their investments profitable. Their movies are expensive to produce, but in return are hugely popular all over the world. Moreover, those movies –the Hollywood standard– cannot be easily imitated elsewhere because of their technical complexity and due to a number of cultural limitations. However, those same movies can be easily and widely pirated through the Internet. Changes in laws, legal actions, website bans, public awareness campaigns... none of this seems to truly work. Every time that websites such as *KickassTorrents* or *Yify* are shut down, they quickly reopen in another place or under another domain. This is an impossible legal battle to win for Hollywood, at least for now. But this does not mean that the industry has resigned to its fate. Hollywood’s real response has been to adapt the way they produce their films to the new media environment. One thing is for sure: the money raised in movie theatres remains the main source of revenue for film industry. The problem is how to attract audiences to theatres when the same product can be downloaded and viewed for free. The approach that Hollywood seems to have embraced is as follows: making products for which worthwhile to go to a movie theatre and pay a rather expensive ticket, instead of downloading a pirated version of this same movie and watch it for free on a television screen, a laptop, or, oddly enough, a mobile phone.

The question is: how has to be a current Hollywood film to succeed at the box office? The answer is quite simple: just look at the films that have grossed more recently. According to Boxofficemojo.com (2016), the top ten films of 2015 were as follows:

1- *Star Wars: The Force Awakens*. Studio/Distributor: Disney. Total gross, in millions: \$2,029.1. Genres: Action, Adventure, Fantasy, Sci-Fi (genres are indicated in all cases according to IMDb). Seventh instalment in the *Star Wars* series.

2- *Jurassic World*. Studio/Distributor: Universal. Total gross, in millions: \$1,670.4. Genres: Action, Adventure, Sci-Fi, Thriller. Fourth instalment in the *Jurassic Park* series.

3- *Furious 7*. Studio/Distributor: Universal. Total gross, in millions: \$1,516. Genres: Action, Crime, Thriller. Seventh film in the *Fast and the Furious* franchise.

4- *Avengers: Age of Ultron*. Studio/Distributor: Disney. Total gross, in millions: \$1,405.4. Genres: Action, Adventure, Sci-Fi. Sequel to 2012's *The Avengers* and the eleventh film in the so-called Marvel Cinematic Universe.

5- *Minions*. Studio/Distributor: Universal. Total gross, in millions: \$1,159.4. Genres: Animation, Comedy, Family. Spin-off to the *Despicable Me* franchise.

6- *Spectre*. Studio/Distributor: Sony. Total gross, in millions: \$879.2. Genres: Action, Adventure, Thriller. Twenty-fourth James Bond film.

7- *Inside Out*. Studio/Distributor: Disney. Total gross, in millions: \$856.8. Genres: Animation, Adventure, Comedy, Family, Fantasy. Single film.

8- *Mission: Impossible-Rogue Nation*. Studio/Distributor: Paramount. Total gross, in millions: \$682.3. Genres: Action, Adventure, Thriller. Fifth instalment in the *Mission: Impossible* series.

9- *The Hunger Games: Mockingjay-Part 2*. Studio/Distributor: Lions Gate. Total gross, in millions: \$652.7. Genres: Adventure, Sci-Fi. Fourth instalment in *The Hunger Games* series.

10- *The Martian*. Studio/Distributor: Fox. Total gross, in millions: \$614.7. Genres: Adventure, Drama, Sci-Fi. Single film.

It is noteworthy that all the movies in this list has been produced or distributed by any of the six major Hollywood studios, except one (*The Hunger Games*) that has been produced by Lions Gate, the largest of the current mini-majors. But, leaving aside this issue, three important aspects can be seen here. First, eight of the ten movies are part of a film franchise, while only two are single movies (*Inside Out* and *The Martian*). Secondly, the more frequent genres in this list are by far action, adventure and science fiction. And finally, all these films have a 3D or IMAX version (at least in certain countries).

According to Boxofficemojo.com (2015), this is what happened in 2014:

1- *Transformers: Age of Extinction*. Studio/Distributor: Paramount. Total gross, in millions: \$1,104.1. Genres: Action, Adventure, Sci-Fi (again, genres are indicated in all cases according to IMDb). Fourth instalment in the *Transformers* series.

2- *The Hobbit: The Desolation of Smaug*. Studio/Distributor: Warner. Total gross, in millions: \$956. Genres: Adventure, Fantasy. Third episode in the *Hobbit* trilogy, prequel to *Lord of the Rings* trilogy.

3- *Guardians of the Galaxy*. Studio/Distributor: Disney. Total gross, in millions: \$773.3. Genres: Action, Adventure, Sci-Fi. Tenth film in the Marvel Cinematic Universe.

4- *Maleficent*. Studio/Distributor: Disney. Total gross, in millions: \$758.5. Genres: Action, Adventure, Family, Fantasy, Romance. Single film (for now).

5- *The Hunger Games: Mockingjay-Part 1*. Studio/Distributor: Lions Gate. Total gross, in millions: \$755.4. Genres: Adventure, Sci-Fi, Thriller. Third instalment in *The Hunger Games* series.

6- *X-Men: Days of Future Past*. Studio/Distributor: Fox. Total gross, in millions: \$747.9. Genres: Action, Adventure, Sci-Fi, Thriller. Seventh instalment in the *X-Men* film series.

7- *Captain America: The Winter Soldier*. Studio/Distributor: Disney. Total gross, in millions: \$714.4. Genres: Action, Adventure, Sci-Fi. Sequel to 2011's *Captain America: The First Avenger* and the ninth film in the Marvel Cinematic Universe.

8- *Dawn of the Planet of the Apes*. Studio/Distributor: Fox. Total gross, in millions: \$710.6. Genres: Action, Adventure, Drama, Sci-Fi. Sequel to 2011's *Rise of the Planet of the Apes*, reboot of the original (1969-1973) *Planet of the Apes* series.

9- *The Amazing Spider-Man 2*. Studio/Distributor: Sony. Total gross, in millions: \$709. Genres: Action, Adventure, Fantasy, Sci-Fi. Fifth film in the *Spider-Man* franchise.

10- *Interstellar*. Studio/Distributor: Paramount. Total gross, in millions: \$675.1. Genres: Adventure, Drama, Sci-Fi. Single film.

As we can see, there are many similarities between this list and the previous one. Only two of the ten films are not part of a franchise (*Maleficent* and *Interstellar*, although a second part of *Maleficent* is scheduled for 2017). As before, action, adventure and Sci-Fi genres are predominant. And, again, all these films have 3D or IMAX versions. If we have a look at 2013 or 2012, results are very similar.

Given the characteristics of the films shown here, the answer to the question of how has to be a blockbuster could be summarized in the following features:

First, a blockbuster must usually be part of a series. In this way the benefits of a franchise system can be exploited. That is, in case of success of the first episode, audience will be almost ensured for the rest of the series. Of course, film franchises are nothing new. But the fact is that their numbers have grown dramatically over the last 15 years, this is, in what might be called Digital Hollywood.

Secondly, a blockbuster must be an overwhelming show both visually and sound. Movies must be designed and produced to be seen on the big screen and be heard in surround sound. Massive visual and sound effects are essential. Only then the viewer perceives that the cost of the ticket has been well spent. Furthermore, it is essential to have 3D and IMAX versions to be even more spectacular. Yet 3D involves a particular way of making movies. The use of 3D in a movie has not only visual and aesthetic implications, but determines to a large extent the screenplay itself. That means than most 3D movies, if not all, contain some sequences specifically designed to enhance the 3D effect, though their role may be superfluous, redundant or even detrimental for the development of the plot. Does that sound to you a thrilling chase through a narrow street, a tunnel or a similar space, in which the camera moves deeply into action?

Surely, because that sort of sequence is present in almost all 3D films, otherwise the three-dimensional effect would not be perceived enough.

Third, a blockbuster must be primarily aimed at young audiences. In general, audiences at movie theatres are largely young: 60% of frequent moviegoers (in U.S./CAN) are below 40 years old, while only 52% of the population is below that age (MPAA, 2015, p. 12). But this trend is even more marked if we consider 3D films. Of note is the high percentage of child audience that 3D cinema has: 40% of the population (U.S./CAN) between 2-17 years old attended a 3D movie in 2014 (MPAA, 2015, p. 17). Thus, it is no coincidence the strong interest of Hollywood in adapting successful literary franchises aimed at children and young adults. Nor is it a coincidence the proliferation, or rather the invasion, of superhero movies based on comic characters. Indeed, in 2009 The Walt Disney Company purchased Marvel Comics mainly in order to have an almost inexhaustible source of material for new productions. Superheroes, science fiction, fantasy, legendary sagas style, all those fictional universes are suitable for young and children and at the same time for the adults that go with them to the theatres.

One aspect that seems to be closely related to this feature is the role of video games in Digital Hollywood. As known, a large majority of children and youth in both developed and emerging countries have become frequent video games players (if not compulsive players). An extensive report led by Amanda Lenhart (2008) states that “nearly all American teens –97%– ages 12-17 play computer, web, console, or mobile games. Teens are also playing these games with relative frequency and duration. Nearly one-third (31%) of teen gamers play games every day, and another one in five (21%) play games three to five days a week” (p. 8). Naturally, Hollywood tries to take advantage of this fact. Yet the relationship between cinema and video games has two sides. On the one hand, blockbusters can give rise to video games based on them (with the same fictional world, same characters, goals, etc.) But on the other hand, the popularity of video games and their visual and narrative codes has pushed cinema to transform itself, becoming more and more similar to video games, especially if we consider action and adventure genres. Due to massive use of virtual sets and computer-generated characters in Hollywood movies, it is sometimes difficult to distinguish if one is before a film sequence or a video game.

Finally, a blockbuster has to be a global product. As mentioned before, Hollywood international sales far outstrip sales in the American market. In addition, while the domestic market seems stagnant, the international market is growing year after year: in 2014 international market was 72% of global market, while in 2010 it was only 66% (MPAA, 2015, p. 4). Where exactly is growing the market for films? Mainly in Asia, as might be expected. In fact, China has become a priority market for Hollywood. A couple of years ago China reached the top position in the international box office market, leaving Japan in second place; while India is now in fifth position and rising rapidly. For sure this new economic reality is forcing Hollywood to adapt the shape and content of their movies to the preferences of new audiences. But, again, it mostly means more 3D. To realise this point, just have a look to the number of 3D screens available in each area of the world: in the Asia Pacific region there are 47,349 digital 3D screens; in the U.S./CAN region 16,146; in Europe/Middle East/Africa 16,888; and in Latin America 4,212 (MPAA, 2015, p. 6). Besides, since 2012 the Chinese government allows the screening of thirty-four foreign films a year in China (it was twenty before), fourteen of which must necessarily be 3D or IMAX. Needless to say what really means here foreign film. China is a huge market for Hollywood, though not without some

problems. For instance, shortly after increasing the share of foreign films, the Chinese government implemented a controversial tax on the box office benefits. That decision started a conflict with Hollywood and even with the American government. It was eventually solved.

It was on the base of all those assumptions as the *Hobbit* project was raised. From the early idea of making a single film, probably the best choice from a narrative viewpoint, the producers decided at a first stage to make two movies and finally ended up making three. The *Hobbit* project could not be raised in any case as a single film, even though appearing as a prequel to *Lord of the Rings*. Or rather, it could be if the producers had considered the issue from a narrative and not merely commercial perspective. In fact, there is an animated television movie directed by Jules Bass and Arthur Rankin Jr. in 1977 the length of which is 77 minutes; and that movie is able to tell the whole story of Tolkien's book without major problems. However, the film version of Jackson was bound to be a movie series, visibly linked to the success of his own previous trilogy. At the end of the day, why charge one ticket when you could charge for three?

To turn the book into three films was necessary to add much new material: parallel plots were created and new characters were invented altogether. For example, in the second film a Woodland Elf named Tauriel appears and, among other things, she falls in love for Kili, one of the dwarves of the party. This character was never suggested in Tolkien's book, or in any of his other works. Some have noted that the inclusion of a female character like this one is a matter of gender balance in a story that, otherwise, would be portrayed mainly by males. As a matter of fact, this addition offers a double advantage for the producers, firstly, it could be a further attraction for audiences, and on the other hand, it allows to further extending the movies.

Certainly *The Hobbit* is a novel with some chases, dangers and fights, but nothing like what happens in the trilogy. In the movies, any situation recounted in the book involving some action is exaggerated and extended to the extreme. This happens, for instance, in the first film, *An Unexpected Journey*, when the party escapes from the goblin's subterranean realm. In this case, the chase sequence becomes a kind of "platform" game in which Gandalf and the dwarves run and jump between suspended platforms and obstacles, while they destroy hundreds of enemies coming out of everywhere. To be more exact, this sequence would be a hybrid between "platform" video games and "adventure and action" games. Actually the whole trilogy is full of sequences that are very reminiscent of a video game genre called "hack and slash". The last straw is probably what happens in the third film, *The Battle of the Five Armies*, a compendium of stabs and severed heads. Astonishingly, almost the whole movie is constructed from a short passage from the book, just a few paragraphs, in which the entire story of the battle is relayed to Bilbo. Those are just a couple of examples of how Jackson's trilogy uses Tolkien's book. The result is a film of high technical quality and great visual impact, probably enjoyable for many, but far removed from the atmosphere and the background of the original *Hobbit*.

To summarize, we could say that Hollywood is trying to adapt its business model to the new media landscape. That is not new, since Hollywood did something similar decades ago, at the end of the so-called Hollywood Golden Age, when television spread, first in the United States and then in the rest of the world, and became a direct competitor for cinema. In the 50s, a *disruptive innovation* (a term coined by Clayton Christensen in 1997) put at risk Hollywood business. Then the industry responded by introducing

drastic changes. First, in the form: against the small black and white screen of the TV, Hollywood began to use massively colour (Technicolor) as well as larger and wider screens (Cinemascope, launched in 1953). Later, when Hollywood learnt that those adjustments were not enough, they also had to change the content: by introducing new themes, new genres, new approaches and new styles, they eventually gave birth to the so-called New Hollywood in the 70s. Since 2000, Hollywood has perceived the threat of another disruptive innovation: Internet and digital technology put in the hands of the viewers a revolutionary way to distribute, exchange and consume film content. Hollywood's response has been, once again, to adapt its business model. In the form: by backing 3D cinema (a not so new technology, indeed), 3D sound or surround sound, and a massive use of computer-generated imagery. And in the content: by adapting bestsellers and saga novels, setting endless franchises, aiming to young audiences, and focusing on genres that are visually very powerful, such as action, fantasy or science-fiction. In short, trying to give compelling reasons to the audience for go to the theatres.

# CHAPTER 9

## ¿Tienen cabida en el mercado los vinos sostenibles?

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### Introducción

En los últimos años, numerosas bodegas han puesto en práctica los diferentes aspectos medioambientales, sociales y económicos relacionados con la sostenibilidad (Forbes y De Silva, 2012). Este interés por parte de las bodegas responde a una demanda del mercado y es consecuencia del creciente interés por parte de los consumidores por este tipo de vinos, ya que cada vez son más los consumidores que tienen en cuenta los aspectos sostenibles y medioambientales en sus procesos de decisión de compra (Smith y Martin, 2004). En este sentido, las decisiones de compra se basan no sólo en lo bien que los productos satisfacen sus necesidades, sino también en cómo estos productos afectan a la sociedad en general. Por ello, cada vez más bodegas tratan de integrar la sostenibilidad en su estrategia de comunicación y de marketing, en un esfuerzo por reforzar su marca y posicionamiento en el mercado. Según Nowak y Washburn (2002), a través de una diferenciación de productos basada en este aspecto las bodegas podrían obtener una ventaja competitiva y aumentar sus ventas.

Dado su interés, algunos autores han analizado el impacto de estas prácticas de producción desde el punto de vista de los consumidores. La mayoría de estos estudios se centran en los aspectos ambientales del proceso de producción (por ejemplo, Barber et al, 2009; Barber, 2010; Bazoché et al., 2008) o hacen referencia a vinos orgánicos (por ejemplo, Brugarolas et al, 2005; Delmas y Grant, 2014; Mann et al, 2012). Sólo un reducido número de trabajos considera, simultáneamente, los tres pilares esenciales de la sostenibilidad (factores ambientales, sociales y económicos) (por ejemplo, Zucca et al, 2009; Forbes et al, 2009).

En cuanto a la producción de vinos sostenibles, cabe realizar dos consideraciones importantes. En primer lugar, cabría preguntarse si existe una predisposición por parte de los consumidores a pagar una prima de precio por estos vinos. De hecho, uno de los principales problemas señalados por las bodegas es que la producción de vinos sostenibles suele implicar unos costes de producción de entre un 25 y un 30 por ciento mayores a los costes de elaboración de vinos "convencionales" similares. Este incremento en el coste, y por lo tanto en el precio de venta, podría estar justificado si los consumidores perciben en estos vinos una mayor utilidad, bien por tener una calidad superior o bien por ser más saludables y/o ecológicos (Brugarolas et al., 2005). En segundo lugar, cabría preguntarse cómo señalan las bodegas al consumidor su compromiso con la sostenibilidad. Se debe tener en cuenta que los productos sostenibles son bienes de confianza, en el sentido de que los consumidores no pueden valorar sus cualidades sostenibles durante el proceso de compra o consumo (Crespi y Marett, 2005). Esto es, dado que los consumidores no están presentes durante el proceso de elaboración del vino no pueden evaluar la sostenibilidad de dicho proceso. Por lo tanto, resultan necesarias señales extrínsecas (como el etiquetado) para reducir la asimetría de información que existe entre las bodegas que producen estos vinos y los consumidores,

y que proporcionan una información fidedigna relacionada con el origen sostenible del producto (Leire y Thidell, 2005).

En particular, el objetivo del trabajo es analizar si los consumidores están dispuestos a pagar una prima de precio por un vino sostenible. La aplicación se desarrolla en el mercado vinícola español, estimando la diferencia existente entre distintos segmentos de mercado. Una vez definido el objetivo del estudio el resto del capítulo se ha estructurado en los siguientes apartados. En el segundo se revisa la literatura académica en este ámbito. El tercer apartado presenta la metodología y muestras utilizadas en el estudio empírico. A continuación, el cuarto apartado presenta los resultados del estudio y, finalmente, el capítulo se cierra con las principales conclusiones del mismo.

### **Revisión de la literatura**

Durante la última década, el concepto de sostenibilidad ha creado un gran interés en el sector vinícola (Renaud et al., 2008). Dado que las bodegas compiten por diferenciar sus productos en el mercado, algunas de ellas han integrado la sostenibilidad en sus procesos de producción en un intento por responder a la demanda del consumidor y diferenciar sus productos. Sin embargo, a pesar de la popularidad que tiene este concepto en la literatura y en el ámbito de la gestión empresarial, Szolnoki (2013) demuestra cómo todavía es muy difícil encontrar una definición precisa del concepto de sostenibilidad. Una de las principales razones que podrían explicar esta falta de consenso es que en la industria del vino cada país, e incluso cada bodega, tiene una comprensión y una interpretación diferente del concepto. De hecho, la mayoría de bodegas asocian la sostenibilidad del vino exclusivamente a los aspectos ambientales de su elaboración, olvidando otros aspectos importantes de la sostenibilidad.

El concepto más ampliamente aceptado de sostenibilidad es aquel que la define a través de la conjunción de tres principios: producción respetuosa con el medio ambiente, económicamente viable y socialmente responsable. En términos generales, la viticultura sostenible comprende el cultivo y la vinificación mediante prácticas respetuosas con el medio ambiente, que resulten viables desde un punto de vista económico en su implementación, y que respondan a las necesidades e intereses de la sociedad en su conjunto (socialmente equitativo).

En cualquier caso, una de las condiciones señaladas por algunos autores, y también por las propias bodegas, es que la implantación efectiva de prácticas de gestión sostenibles requiere que los clientes estén dispuestos a pagar un sobreprecio (o prima de precio) para sufragar el mayor coste derivado de la implementación de este tipo de prácticas, especialmente las relacionadas con el medio ambiente. Por ejemplo, esto es particularmente importante para los vinos orgánicos, ya que muchas bodegas afirman que los costes de elaboración de estos vinos son más altos que los de la producción de un vino "convencional" de similares características.

Desde un punto de vista académico, algunos autores han tratado de estimar el número de consumidores de vino dispuestos a comprar vinos sostenibles, y sobre todo, estimar si existe una predisposición a pagar un precio mayor por dichos vinos. Sin embargo, sólo unos pocos estudios consideran los tres pilares esenciales de la sostenibilidad en su conjunto (por ejemplo, Zucca et al, 2009; Forbes et al, 2009), ya que la mayoría de ellos se centran, exclusivamente, en alguno de sus matices como, por ejemplo, los vinos ecológicos u orgánicos (por ejemplo, Brugarolas et al., 2005; Delmas y Grant, 2014; Mann et al, 2012; Barber et al, 2009; Barber, 2010; Bazoché et al, 2008). En general,

los consumidores parecen tener opiniones encontradas acerca de la sostenibilidad, ya que los resultados no son concluyentes. Por un lado, varios autores afirman que los consumidores no están dispuestos a renunciar a la calidad de un vino por sus cualidades ambientales y/o sociales (Lockshin y Corsi, 2012), demostrando que la demanda de los clientes no es uno de los factores que explican la adopción de prácticas sostenibles por parte de las bodegas (Gabzdylova et al., 2009). Por otro lado, algunos autores sostienen que la sostenibilidad podría convertirse en una importante ventaja competitiva en el ámbito internacional para las bodegas (por ejemplo, Pullman et al., 2010, Forbes et al., 2009, Bison et al., 2002), argumentando que los consumidores sí valoran las prácticas sostenibles en la producción de vino y están dispuestos a comprar este tipo de vinos, pagando incluso un precio mayor por ellos.

En cuanto a los vinos sostenibles, Forbes et al. (2009), en un estudio desarrollado en Nueva Zelanda, muestran que casi el 73 por ciento de los encuestados declararon estar interesados en los vinos sostenibles. Zucca et al. (2009), en un estudio en California, concluyen que la mayoría de los clientes valora positivamente los vinos sostenibles, incluso cuando no tienen claro lo que significa este término. Por último, Mueller y Remaud (2013), basados en un estudio internacional demuestran que, globalmente, los consumidores tienen una mayor predisposición a pagar un precio mayor por los vinos ecológicos que por los vinos socialmente responsables. Además, esta predisposición a pagar más no es uniforme en todos los mercados, siendo incluso negativa en algunos de ellos (por ejemplo, en Francia y la zona francófona de Canadá). Pomarici y Vecchio (2014), a partir de una encuesta con 500 consumidores italianos, evalúan el interés del consumidor *millennial* por este tipo de vinos así como su disposición a comprar tres vinos con etiquetas específicas que certifican determinados atributos medioambientales, sociales y éticos, siendo el vino con una etiqueta relacionada con aspectos sociales (Libera Terra) el que obtiene la tasa de aceptación más alta. Además, los resultados evidencian la existencia de diferencias según el perfil del consumidor, de forma que las mujeres, de entre 27-35 años y que viven en una zona urbana presentan una mayor probabilidad a comprar estos vinos sostenibles.

En cuanto a los vinos ecológicos, la mayoría de los trabajos muestran una disposición positiva a pagar por ellos un precio mayor. Berghoef y Dodds (2011) revelan que la mayoría de los consumidores están algo interesados en la compra de un vino con etiqueta ecológica y que la mayoría (65%) también están dispuestos a pagar una prima de precio de medio dólar o más, aunque esta disposición a pagar puede variar entre los diferentes tipos de consumidores. Brugarolas et al. (2005) estiman la prima de precio que los consumidores españoles están dispuestos a pagar por un vino ecológico (orgánico) con respecto al precio de un vino convencional con características similares. Sus resultados muestran que, dependiendo del método utilizado, la prima de precio promedio se sitúa entre el 16,29% y 16,92%. Los consumidores con un estilo de vida saludable son los que están dispuestos a pagar un precio más alto por un vino ecológico. Barber et al. (2009) encuentran que los consumidores con mayor conciencia ambiental tienen una mayor predisposición a adquirir vinos ecológicos. Barber (2010) muestra que los consumidores más respetuosos con el medio ambiente, y que tienen en cuenta estas cuestiones ambientales al hacer una compra, tienen una mayor intención a pagar más por los vinos ecológicos. Laoroche et al (2001) investigan los perfiles demográficos, psicológicos y de comportamiento de los consumidores que están dispuestos a pagar más por productos ecológicos, encontrando que el segmento con mayor probabilidad de compra está formado por mujeres, casadas y con al menos un niño que vive en el hogar. Loureiro (2003) estima que los vinos ecológicos reciben una prima muy limitada en

comparación con los vinos convencionales. En esta línea, Delmas y Grant (2014) encuentran que los consumidores no están dispuestos a pagar una prima de precio por vinos con etiquetas ecológicas, aunque observan que los vinos ecológicos, incluso sin certificar, son sensiblemente más caros. Este resultado avala la idea de que los vinos ecológicos están asociados con cambios en los procesos de producción que derivan en la elaboración de vinos con una calidad superior y, por tanto, más caros, incluso cuando estos atributos no son comunicados directamente al consumidor a través de la etiqueta.

### **Metodología y muestra**

Para estimar la predisposición a pagar (PAP) (en inglés, “willingness-to-pay” WTP) por un vino sostenible se ha diseñado un experimento basado en la valoración contingente.

En términos generales, podemos definir la PAP como la cantidad máxima que un consumidor está dispuesto a pagar por una cantidad dada de un elemento (Kalish y Nelson, 1991; Varian, 1992). En concreto, se ha diseñado un experimento basado en un cuestionario para probar si los consumidores pagarían un precio superior o no (en porcentaje) por un vino sostenible con relación a lo que pagarían por un vino “convencional” de características similares. El cuestionario se aplicó a través de Internet dada su bondad para este tipo de experimentos frente al tradicional cuestionario personal (Sethuraman et al., 2005). La población objeto de estudio se corresponde únicamente con consumidores de vino, dado que la valoración contingente requiere que los consumidores tengan cierto grado de conocimiento sobre el producto elegido (Cummings et al, 1986; Bateman y Turner, 1993). Según Tversky y Kahneman (1974), los factores contextuales y el punto o precio de partida inicial (también conocido como ancla –*anchor*–) pueden influir en el juicio de valor que emite el consumidor, de forma que los individuos que parten de un precio más bajo tienden a dar estimaciones más bajas que aquellos que parten de precios más altos (Chapman y Johnson, 1994). Por ello, los participantes fueron divididos aleatoriamente en tres sub-muestras y se seleccionaron tres precios iniciales o anclas diferentes (5, 10 y 15 euros) para el precio del vino convencional. En la primera pregunta se ponía al consumidor en situación de ir a comprar una botella de vino de 5, 10 ó 15 euros, según la sub-muestra, y luego se le preguntaba: “¿Estaría usted dispuesto a pagar un precio mayor por un vino sostenible con relación al precio de un vino convencional con características similares?”. Para darle mayor grado de realismo, el concepto de sostenibilidad no se explicó a los participantes. En la segunda pregunta, con un formato abierto, se preguntó a los participantes sobre la prima de precio máxima que estarían dispuestos a pagar. Para clasificar a los participantes en los diferentes segmentos, se recopiló información sobre aspectos sociodemográficos, estilos de vida, actitudes y hábitos de consumo de vino a través de una serie de preguntas diseñadas a partir del estudio de la OEMV (2009). El cuestionario estuvo disponible en línea en diciembre de 2014 y fue distribuido y promovido a través de blogs y perfiles de redes sociales relacionados con el vino. Después de algunos ajustes para descartar respuestas incompletas, la muestra final está compuesta por 553 participantes (182 en la primera sub-muestra, 187 en la segunda sub-muestra y 184 en la tercera).

**Tabla 1. Estadística descriptiva de la muestra.**

Características	n	%	Características	n	%
<i>Edad</i>			<i>Ingresos mensuales</i>		

Características	<i>n</i>	%	Características	<i>n</i>	%
18–24	139	25,1	Menos de 600€	100	18,1
25–34	212	38,3	600–999	149	26,9
35–44	122	22,1	1.000–1.499	130	23,5
45–54	48	8,7	1.500–2.500	94	17,0
Más de 55	32	5,8	Más de 2.500	80	14,5
<b>Género</b>					
Hombre	350	63.3	Mujer	203	36.7

En cuanto al perfil de los participantes, la Tabla 1 contiene la información descriptiva de la muestra final del estudio. El Análisis de Varianza (ANOVA) no evidenció diferencias significativas de perfil entre los participantes de las tres sub-muestras.

Con el fin de analizar el impacto de diversas variables sobre la PAP del consumidor por un vino sostenible se emplearon diferentes pruebas paramétricas y análisis de regresión.

## Resultados

La Tabla 2 muestra los resultados generales sobre la PAP un precio superior por un vino sostenible. De forma global, el 77,9% de los participantes pagaría un precio superior por un vino sostenible. La prima de precio media que pagarían los consumidores es del 12,87% ( $SD = 5,32$ ).

Como se puede observar (ver Tabla 2), el promedio de la prima de precio varía ligeramente en función del precio inicial de referencia propuesto, desde un mínimo del 12,53% (sub-muestra 1) hasta un máximo del 13,19% (sub-muestra 3). No obstante, esta diferencia no es estadísticamente significativa ( $F = 0,548$ ;  $p = 0,578$ ).

**Tabla 2. Predisposición a pagar y prima de precio media según precio inicial de partida.**

Sub-muestra 1 (precio inicial 5 euros)	Sub-muestra 2 (precio inicial 10 euros)	Sub-muestra 3) (precio inicial 15 euros)	Global

<i>% de consumidores dispuestos a pagar una prima de precio</i>	82,4	76,5	75	77,9
<i>% de prima de precio media (S.D.)</i>	12,53 (5,45)	12,90 (5,32)	13,19 (5,19)	12,87 (5,32)

Adicionalmente, los resultados muestran que la PAP una prima de precio varía en función del grado de conocimiento de los consumidores sobre la cultura del vino. Como puede verse en la Tabla 3, conforme el grado de conocimiento de los consumidores aumenta, tanto el porcentaje de consumidores que pagaría una prima como la prima de precio media que se pagaría disminuye. Esta última diferencia es estadísticamente significativa ( $F = 455,75$ ;  $p = 0,00$ ).

**Tabla 3. Predisposición a pagar y prima de precio media según el grado de conocimiento de la cultura del vino.**

	(1) Principiante	(2)	(3)	(4)	(5) Experto	Global
<i>% de consumidores dispuestos a pagar una prima de precio</i>	87,2	76,5	81,2	75	61,6	77,9%
<i>% de prima de precio media (S.D.)</i>	18,72 (3,26)	15,02 (3,39)	10,97 (2,31)	8,1 (2,44)	5,08 (2,08)	12,87 (5,32)

Además, los resultados también muestran diferencias importantes en la PAP entre los diferentes segmentos de mercado identificados. Como se muestra en la Tabla 4, los consumidores “urbanos” presentan la mayor predisposición a pagar una prima de precio por un vino sostenible, mientras que los consumidores “trendy” pagarían la prima de precio más alta y los consumidores tradicionales pagarían la prima de precio más baja. Estas diferencias son estadísticamente significativas ( $F = 455,75$ ;  $p = 0,00$ ).

Aunque análisis previos para el mercado español sólo analizan la PAP por un vino orgánico (por ejemplo, Brugarolas et al., 2005), estos resultados confirman la idea de que los consumidores de vino españoles tienen una actitud positiva hacia este tipo de vinos, que no sólo se consideran las características intrínsecas del vino en sí, sino también la actitud de la bodega hacia la sostenibilidad.

**Tabla 4. Predisposición a pagar y prima de precio media según el segmento de mercado.**

	Tradicion al	Urban o	Trend y	Rutinari o	Ocasion al	Socia l	Globa l
<i>% de consumidor es dispuestos a pagar una prima de precio</i>	76,9%	84,6%	80,2%	70,2%	74,3%	84,1 %	77,9 %
<i>% de prima de precio media (S.D.)</i>	9,75 (4,79)	13,11 (5,66)	14,41 (5,15)	13,25 (4,57)	11,92 (4,91)	12,97 (5,91)	12,87 (5,32)

Con el fin de explicar y predecir la PAP por un vino sostenible, se han estimado dos modelos de regresión. En primer lugar, una regresión logística donde la variable dependiente es una variable dicotómica que toma el valor "1" si el consumidor está dispuesto a pagar una prima de precio por un vino sostenible, y "0" si no pagaría la prima de precio. En segundo lugar, una regresión estimada mediante Mínimos Cuadrados Ordinarios donde la variable dependiente es el porcentaje de incremento de precio que el consumidor estaría dispuesto a pagar.

En cuanto a la primera regresión, como se puede ver en la Tabla 5, el parámetro de la variable que considera el género del participante no es significativo. En cuanto a la edad, los resultados muestran un impacto positivo de esta variable sobre la disposición de los consumidores a pagar una prima de precio (a mayor edad mayor predisposición a pagar una prima de precio). Además, el nivel de conocimiento sobre la cultura del vino tiene un impacto negativo en la PAP, mientras que el nivel de conocimiento acerca de los productos sostenibles tiene un impacto positivo en la PAP. Por último, la variable de ingreso familiar mensual también tiene un impacto positivo.

**Tabla 5. Factores determinantes de la DAP (Regresión logística).**

	B	S.D.	Wald	Sig.	Exp(B)
Constante	-2,683	0,634	17,913	0,000	0,068
Género (1=hombre; 0=mujer)	-0,049	0,253	0,037	0,847	0,952
Edad	0,029	0,012	5,742	0,017	1,030

<i>Nivel de conocimiento de la cultura del vino</i>	-0,432	0,090	22,806	0,000	0,649
<i>Nivel de conocimiento sobre los productos sostenibles</i>	0,835	0,114	53,995	0,000	2,304
<i>Ingresos mensuales</i>	0,880	0,116	57,155	0,000	2,411

B: coeficiente estimado. SD: Desviación estándar. Wald: (B/S.D)<sup>2</sup>. Si el estadístico de Wald es estadísticamente significativo (menor que 0,05) entonces el parámetro es relevante para el modelo.

En cuanto a los factores determinantes de la prima de precio que los consumidores están dispuestos a pagar, la Tabla 6 muestra que el parámetro de la variable de género es significativa (las mujeres están dispuestas a pagar una prima de precio mayor), pero la variable edad no resulta significativa. El nivel de conocimiento sobre la cultura del vino tiene un impacto negativo sobre la prima de precio que se pagaría, mientras que el nivel de conocimiento acerca de los productos sostenibles tiene un impacto positivo. Por último, la variable que recoge el nivel de ingreso familiar mensual no resulta significativa.

**Tabla 6. Factores determinantes de la prima de precio (MCO).**

	B	S.D.	t	Sig.
<i>Constante</i>	20,023	0,556	36,035	0,000
<i>Género (1=hombre; 0=mujer)</i>	-0,511	0,223	-2,290	0,022
<i>Edad</i>	0,010	0,009	1,048	0,295
<i>Nivel de conocimiento de la cultura del vino</i>	-3,485	0,079	-44,090	0,000
<i>Nivel de conocimiento sobre los productos sostenibles</i>	0,503	0,081	6,223	0,000
<i>Ingresos mensuales</i>	0,138	0,087	1,583	0,114
<i>Constante</i>	401,214			0,000

## Conclusiones

El objetivo de este trabajo ha sido analizar la predisposición del consumidor a pagar una prima de precio por un vino sostenible con relación a un vino convencional de similares características. Como novedad, este trabajo compara dicha predisposición a pagar entre los diferentes segmentos de mercado identificados en el mercado del vino español.

Los resultados muestran que la mayoría de los consumidores de vino españoles están dispuestos a pagar una prima de precio por un vino sostenible. Los resultados también muestran diferencias importantes entre los diferentes segmentos de mercado. Diferentes características socio-económicas de los consumidores y el nivel de conocimiento sobre la cultura del vino y la sostenibilidad afectan a la predisposición a pagar una prima de precio por este tipo de vinos.

Teniendo en cuenta que el consumo de vino de calidad se encuentra en una situación muy competitiva en España, los resultados muestran que los vinos sostenibles pueden ser considerados como una oportunidad de mercado para las bodegas. Sin embargo, las bodegas no deben olvidar que la intención de compra no siempre se traduce en un comportamiento de compra real. Por lo tanto, investigaciones futuras deben tratar de hacer frente a escenarios más complejos para evaluar la disposición "real" a pagar una prima de precio por este tipo de vinos.

# CHAPTER 10

## Cómo medir la competencia usando el enfoque de la Nueva Organización Industrial Empírica

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### Introducción

El marketing tiene como principal objetivo el desarrollo de actividades que satisfagan las necesidades del consumidor dejando un beneficio para la empresa que las implementa (Leeflang y Wittink, 2001). Sin embargo, la elección de las estrategias de marketing que la empresa empleará para satisfacer las necesidades del consumidor no es una decisión aislada sino que está relacionada con otras estructuras de la propia empresa y del mercado. Así, el impacto de las decisiones estratégicas de marketing mix tomadas por una empresa sobre su propia rentabilidad debería ser medido mediante la comprensión de los efectos de esas estrategias en la demanda del consumidor, en los costes en los que incurre la empresa y en el propio análisis de la competencia (Kadiyali, Sudhir y Rao, 2001).

La literatura existente ha examinado en numerosas ocasiones el impacto que las decisiones sobre las variables estratégicas de marketing tienen sobre los beneficios de la empresa. Ello ha permitido comprender los efectos de dichas decisiones sobre la demanda de los productos de la empresa y sobre sus costes. Adicionalmente, la demanda y los costes de una empresa, así como las decisiones sobre las variables estratégicas de marketing que pueda tomar, se verán afectados por el mismo tipo de decisiones que tomen sus rivales. Es decir, para entender los efectos sobre los beneficios que provoca una decisión tomada acerca de los instrumentos de marketing, deben estudiarse además sus efectos sobre la demanda, los costes y las reacciones de los rivales (Kadiyali et al., 2001). Con todo, mientras que los efectos de las estrategias de marketing mix sobre la demanda de los consumidores han sido analizados con gran profundidad en la investigación de marketing, la investigación de sus efectos sobre las reacciones estratégicas de los competidores ante una acción de marketing mix ha sido mucho más limitada.

Es decir, es obvio que, para tener éxito en un mercado competitivo, la empresa debe proporcionar a sus clientes mayor valor y mayor satisfacción que sus rivales. De esta forma, los profesionales de marketing no sólo deben adaptarse a las necesidades de los consumidores objetivo; también deben alcanzar una ventaja competitiva posicionando sus ofertas contundentemente en la mente de los consumidores frente a las ofertas de los competidores. Para diseñar una estrategia de marketing eficaz, la empresa ha de conocer la mayor cantidad posible de información sobre su competencia. Es decir, debe comparar continuamente sus propias estrategias de marketing, sus objetivos, sus productos, precios, canales y promociones con las de los competidores más próximos. Además, es fundamental conocer con detalle sus modelos de reacción ante los movimientos de la empresa como reducciones de precios, incrementos de la promoción o introducción de nuevos productos en el mercado (Kotler y Armstrong, 2008). Y es que parece claro que la empresa y sus competidores juegan en el mismo mercado y que la captación de clientes aparece siempre ligada a la formalización de los objetivos de las

empresas participantes. Mediante un análisis profundo y una supervisión continua de los competidores se puede conocer sus principales comportamientos competitivos y, de esta forma, predecir sus próximos movimientos.

Cuando una empresa inicia una nueva acción de marketing, lo hace pensando que, a través de sus acciones, influirá en el comportamiento del consumidor de forma que favorezca a la propia empresa. Pero además de la influencia sobre el consumidor, la empresa debe pensar que su nueva acción también provocará, con una alta probabilidad, una reacción por parte de otras empresas. Precisamente, el análisis de la rivalidad entre empresas se ha revelado como un aspecto de suma importancia. En los últimos años, el análisis de la interacción competitiva entre las empresas ha destacado claramente que una característica fundamental de la competencia es que las empresas son mutuamente dependientes; es decir, las acciones de una empresa dependen en cierta medida de la reacción de sus competidores (Putsis y Dhar, 1998). A menudo, dicha reacción se basa en la creencia de los rivales de que las estrategias de negocio son un juego de suma igual a cero, es decir, en la idea de que si no actúan perderán cuota de mercado (Leeflang y Wittink, 2001). Así pues, para una empresa es muy importante comprender la naturaleza del juego que se está desarrollando en el mercado objetivo. Aunque respuesta competitiva puede ser entendida a través de diversas dimensiones diferentes (por ejemplo, Bowman y Gatignon 1996), un importante primer paso en este sentido requiere un análisis y comprensión del tipo de interacción competitiva que está ocurriendo entre dos o más empresas.

### **Revisión teórica de las líneas de investigación sobre la competencia en marketing**

Durante las dos últimas décadas se ha prestado considerable atención al desarrollo del marketing estratégico y a la planificación y toma de decisiones dentro de la empresa. En este período han surgido nuevas teorías, nuevos paradigmas, nuevos conceptos y nuevas herramientas para el estudio de estos tópicos. Así, las líneas de investigación propuestas por Day y Wensley (1988) y Wind y Robertson (1983) incluyen términos como el comportamiento competitivo de un mercado, el desarrollo de estrategias de marketing defensivas / ofensivas y la formulación y aplicación de métodos que alcancen a medir las acciones y reacciones competitivas entre las diferentes empresas que componen un mercado (Leeflang y Wittink, 1992).

Desde el punto de vista teórico, este apartado trata de poner de relieve el avance que han supuesto los nuevos enfoques empíricos encuadrados dentro de la Organización Industrial para la investigación empírica en Marketing. En este sentido, este punto revisa las diferentes corrientes de investigación de la rivalidad desde la perspectiva de las tradiciones de modelización en la Organización Industrial Empírica, y que son clasificadas por Kadiyali et al. (2001) y Bresnahan (1989), distinguiendo los trabajos que analizan varias industrias, encuadrados en el paradigma clásico de la “Estructura-Conducta-Resultados”, y aquéllos que estudian una industria específica. Son precisamente estos últimos los que permiten incorporar mayor detalle a nivel de industria y empresa para modelizar la demanda, los costes y la competencia, por lo que mejora el análisis de la relación entre el marketing mix y los resultados.

En definitiva, se distinguen dos grandes líneas en la literatura empírica de la estrategia de marketing aplicada en las últimas décadas:

- Paradigma Estructura-Conducta-Resultados (ECR) cuyo máximo esplendor se alcanzó desde la década de los cincuenta hasta la década de los setenta. Tiene su

origen en el trabajo de Bain (1951) y la principal hipótesis de este paradigma de la Organización Industrial Empírica es que las características observables de la estructura de un mercado determinan el comportamiento de las empresas que operan en el mismo. Además, dicha conducta se manifiesta en términos de unos resultados también observables para lo cual, utiliza datos de sección cruzada entre diferentes industrias con el fin de identificar el comportamiento de las empresas. En el campo del marketing, muchos de estos estudios han utilizado los datos del “Profit Impact of Marketing Strategies” (PIMS) (para una revisión, véase el trabajo de Buzzell y Gale, 1987) tratando de identificar las relaciones empíricas entre las decisiones referidas a determinados instrumentos de marketing (publicidad, algunos componentes del coste como I+D, etc.) y los beneficios de las empresas. Entre sus principales inconvenientes de este paradigma destaca el hecho de que ignore la heterogeneidad industrial y que no identifique el efecto causal.

- La insatisfacción con algunos de los supuestos fundamentales de este paradigma, junto con la disponibilidad de mayor cantidad y calidad de información, así como una mejora sustancial en ciertas técnicas cuantitativas surgidas de los avances en la Teoría de Juegos, motivará que en la década de los ochenta se produzca un cambio de orientación hacia lo que Bresnahan (1989) denominó como “Nueva Organización Industrial Empírica” (NOIE). La línea de investigación NOIE incorpora mayor detalle a nivel de industria y de empresa para modelizar la demanda, los costes y la competencia y, de esta forma, analizar la relación entre los instrumentos de marketing implementados por la empresa y los beneficios alcanzados por la misma. Es decir, estos modelos se presentan con tres ingredientes básicos (1) especificación de la demanda, (2) especificación de costes, y (3) la especificación de la interacción competitiva. En definitiva, este paradigma puede considerarse como el siguiente paso en la evolución de la investigación empírica de la estrategia de marketing después del enfoque ECR. Una comparación de los modelos usados en la línea de investigación NOIE con los que prevalecían en el paradigma ERC nos conduce a ciertos avances derivados de dos características: 1) los modelos NOIE se estiman a nivel de una industria concreta, y más específicamente, a nivel de empresa dentro de una única industria, y 2) se derivan de la especificación explícita de la demanda y los costes, y de las derivadas resultantes de maximizar los beneficios.

El auge y evolución de estas líneas de investigación tienen como explicación principal la elevada aplicabilidad de las mismas al entorno económico. Concretamente, se pudo comprobar que este tipo de investigaciones tenían múltiples campos de aplicación y numerosas implicaciones sobre la estrategia de negocios de las empresas y sobre algunos aspectos de la política pública. Por un lado, a nivel de estrategia empresarial, cuando un directivo tiene que, por ejemplo, decidir si lanza un nuevo producto al mercado, una de las decisiones principales versará sobre qué precio es el más adecuado para dicho lanzamiento de forma que pueda anticipar la reacción de los competidores y obtener un beneficio máximo con su comercialización. Para poder resolver con acierto dicha incertidumbre, necesitaría predecir la demanda y la respuesta de los competidores ante las diversas posibilidades que la fijación del precio ofrece. La aplicación de estos modelos empíricos para casos como este requiere, entre otros, datos sobre las ventas actuales en el mercado de un tipo de producto igual o similar, los precios actuales de la competencia, los atributos principales del producto y los determinantes de la demanda.

Por otro lado, a nivel de política pública, los economistas de la Organización Industrial han estado particularmente preocupados por los efectos de algunas medidas de

intervención del gobierno en el comportamiento competitivo de las empresas, en el cumplimiento de la legislación referida a la defensa de la competencia, en el correcto funcionamiento de las leyes del mercado, las políticas de regulación/desregulación, etc. Si, por ejemplo, un gobierno aprueba una nueva política medioambiental que conlleve nuevas restricciones a las emisiones de agentes contaminantes provenientes en un sector concreto, las empresas que componen ese sector deberán adoptar nuevas tecnologías más limpias y respetuosas con el medio ambiente. Por tanto, esta nueva política gubernamental provocará cambios en la estructura de costes de las empresas del sector y, consecuentemente, afectará a la competencia (si la nueva tecnología reduce los costes variables, pero los costes fijos se incrementan, cabría esperar un descenso en el número de empresas competidoras y un aumento de su tamaño medio). Para predecir el efecto que tienen estas medidas públicas sobre el comportamiento competitivo de las empresas dentro del sector afectado, el gobierno necesitaría manejar datos sobre precios, cantidades vendidas y número de empresas que operan en el sector.

### **Alternativas de modelización de la interacción competitiva**

El enfoque típico en la Nueva Organización Industrial Empírica consiste en el uso de un modelo formal derivado de la Teoría de Juegos en el que las empresas, como unidad de análisis, maximizan sus beneficios. Así, desde un punto de vista de la Teoría de Juegos, las interacciones competitivas entre empresas pueden clasificarse en patrones simétricos y en patrones asimétricos (Putsis y Dhar, 1998). En un duopolio diferenciado, con cada empresa ofreciendo un producto y donde la variable estratégica de rivalidad es el precio, la interacción simétrica implica que las dos empresas responden a las acciones de su rival de la misma forma. Existen varios tipos de interacciones competitivas simétricas, entre las que destacan: i) Cooperación. En este caso, una interacción cooperativa implicaría que las dos empresas incrementan su precio de forma coordinada; ii) No coordinada. Una subida de precio por parte de cualquiera de las dos empresas implicadas conllevaría una bajada de precio de la otra rival como reacción; y iii) Independiente (o de Nash). Finalmente, la falta de respuesta por ambas empresas rivales también se considera simétrica. Por otro lado, la Teoría de Juegos de la Organización Industrial distingue diferentes patrones asimétricos en la interacción competitiva, es decir, cuando las empresas no reaccionan de la misma forma ante una acción inicial: i) Conducta Líder-seguidor (Equilibrio de Stackelberg) Este comportamiento implica que una empresa (seguidor) reacciona a los cambios en las acciones de sus rivales, mientras que la otra (líder) no lo hace; ii) Dominante-fringe. El último tipo de interacción viene referido al caso en el que dos estrategias competitivas de dos empresas pueden ir en sentido opuesto, es decir, cuando una empresa (fringe) se comporta de manera cooperativa, la otra (dominante) compite de forma no cooperativa (Spiller y Favaro, 1984). Con otras palabras, una empresa sigue simplemente las acciones de un rival más fuerte. Ello obedece a que la empresa más débil (“fringe”) podría no querer competir directamente con la empresa dominante, por lo que se acomoda a los esfuerzos competitivos de su rival más grande. En cambio, las empresas con una posición dominante en cuota de mercado defienden contundentemente su posición de mercado, adoptando una postura no cooperativa.

Siguiendo a Kadiyali et al. (2001, en lo que respecta a la medición empírica de la interacción competitiva entre dos empresas, se van a exponer tres enfoques diferentes para modelizar: (1) El Enfoque de Menú; (2) El Enfoque de Variaciones Conjeturales; (3) El Parámetro de Conducta; y (4) El Enfoque del Beneficio Ponderado. Para dicha ilustración de los enfoques más usados para modelizar esta interacción competitiva, se

va a considerar el caso más sencillo, es decir, un duopolio en el que cada empresa ofrece un producto diferenciado. En cualquier caso, los cuatro enfoques de la NOIE precisan especificar la función de demanda, la función de costes y la interacción competitiva a partir de la función de los beneficios.

Así pues, la especificación de la demanda puede variar desde modelos simples, como el lineal o el log-lineal, hasta modelos no lineales flexibles, como el modelo logit con coeficientes aleatorios que consideren la heterogeneidad de las preferencias del consumidor. Para este caso concreto, y puesto que se trata de una ilustración sencilla del modelo, se utilizará una función simple de la demanda de los dos productos ( $q_1$  y  $q_2$ ), tal y como sigue a continuación:

$$q_1 = a_1 + b_{11}p_1 + b_{12}p_2$$

$$q_2 = a_2 + b_{21}p_1 + b_{22}p_2$$

Respecto a los costes marginales de los dos productos ( $c_1$  y  $c_2$ ), también podrían utilizarse diversas especificaciones que van desde un modelo simple de costes marginales constantes hasta modelos lineales o log-lineales en función de los precios de los inputs de producción. En este caso, se utilizan el modelo simple lineal.

Finalmente, para el caso de la especificación de las interacciones competitivas, se parte de la función de beneficios. En este caso, se asume que cada empresa elige los precios que maximizan sus beneficios en cada periodo de estudio. Así pues, los beneficios de cada empresa vienen dados por la siguiente expresión:

$$\pi_i = (p_i - c_i)q_i, i = 1,2.$$

### **Enfoque de Menú (también conocido como Comparación de Modelos No Anidados, NNMC)**

La Comparación de Modelos No Anidados se desarrolla a partir de las condiciones de equilibrio bajo la asunción de cierto tipo de comportamiento de la empresa (por ejemplo, Nash o Stackelberg). A través del test introducido por Vuong (1989), el objetivo de este tipo de procedimiento es testar qué tipo de comportamiento es el que mejor se ajusta a los datos. Gasmi y Vuong (1991), Gasmi, Laffont y Vuong (1992) y Kadiyali, Vilcassim and Chintagunta (1996), entre otros, son ejemplos de trabajos que han utilizado la comparación de modelos no anidados. Este procedimiento se conoce como “Enfoque Menú” puesto que el investigador infiere el tipo de comportamiento de la empresa basado en la decisión de cuál de todas las posibilidades competitivas disponibles es el que mejor se ajusta a los datos.

A continuación se derivan las condiciones de primer orden del modelo bajo diferentes equilibrios que muestran las posibles interacciones competitivas entre las dos empresas y se selecciona el equilibrio competitivo que mejor ajusta los datos. Para este caso, se van a derivar las siguientes interacciones competitivas: Equilibrio independiente, de Stackelberg y cooperativo.

#### Equilibrio independiente o de Nash.

Cada empresa  $i$  elige sus precios asumiendo que su competidor no reacciona a sus cambios en los precios ( $\partial p_j / \partial p_i = 0$ ). La condición de primer orden para la empresa  $i$  es como sigue:

$$\frac{\partial \pi_i}{\partial p_i} = (p_i - c_i) \frac{\partial q_i}{\partial p_i} + q_i = 0$$

Suponiendo una especificación lineal de la demanda, se llega a la siguiente expresión:

$$\frac{\partial \pi_i}{\partial p_i} = (p_i - c_i)b_{ii} + q_i = 0$$

#### Equilibrio de Stackelberg o Líder-Seguidor

Los supuestos de partida indican que la empresa 1 es la líder y la empresa 2 es la seguidora. Precisamente, la seguidora elige sus precios asumiendo que la líder no reacciona a los cambios en sus precios (por tanto, asume que  $\frac{\partial p_1}{\partial p_2} = 0$ ). En cambio, la líder anticipa la reacción del seguidor e incorpora la misma a su comportamiento competitivo de precios. Así pues, el líder asume que  $\frac{\partial p_2}{\partial p_1} \neq 0$ .

La condición de primer orden para la empresa seguidora es:

$$\frac{\partial \pi_2}{\partial p_2} = (p_2 - c_2)b_{22} + q_2 = 0$$

De donde se deriva:

$$\frac{\partial p_2}{\partial p_1} = -b_{21}/2b_{22}$$

Por otro lado, la condición de primer orden de la empresa líder ( $\frac{\partial \pi_1}{\partial p_1}$ ) es:

$$(p_1 - c_1) \left( \frac{\partial q_1}{\partial p_1} + \frac{\partial q_1}{\partial p_2} \frac{\partial p_2}{\partial p_1} \right) + q_1 = 0$$

Y suponiendo una especificación lineal de la demanda, se obtiene la siguiente expresión:

$$(p_1 - c_1) \left( b_{11} + b_{12} \frac{b_{21}}{2b_{22}} \right) + q_1 = 0$$

#### Equilibrio cooperativo

Bajo este tipo de equilibrio, las empresas eligen sus precios de forma colusiva para maximizar sus beneficios conjuntos. Así pues, la función objetiva a maximizar en este caso sería:

$$\pi = (p_1 - c_1)q_1 + (p_2 - c_2)q_2$$

La condición de primer orden para la empresa  $i$  sería:

$$\frac{\partial \pi}{\partial p_i} = (p_i - c_i)b_{ii} + (p_j - c_j)b_{ji} + q_j, j \neq i, i = 1, 2$$

La estimación de este enfoque se realiza a través de un sistema de ecuaciones simultáneas usando métodos como 3 Stage Least Squares (3SLS), Full Information Maximun Likelihood (FIML) o Generalized Method of Moments (GMM). Con el método de estimación 3SLS, el equilibrio que mejor se ajusta a los datos será aquel que minimiza la suma de los cuadrados. Con el método de estimación FIML, el equilibrio seleccionado será aquel que resulte de aplicar el test de Cox. Finalmente, con el método de estimación GMM, se pueden utilizar test similares al de Cox para seleccionar el equilibrio más adecuado.

El principal problema que presenta la estimación de estos modelos es la endogeneidad. Para controlar este problema, la literatura contempla los dos enfoques siguientes (Shugan, 2004; Dhar et al., 2004): El primer enfoque, más comúnmente aplicado es el de variables instrumentales, que implica la selección previa de un conjunto de instrumentos no correlacionados con los residuos. El segundo enfoque trata de especificar la ecuación de la variable endógena de manera que refleje el comportamiento estratégico de la empresa, para posteriormente incluir dicha especificación en la estimación simultánea del modelo.

### **Enfoque de Variaciones Conjeturales**

Basado en el trabajo pionero de Iwata (1974), el parámetro de variación conjetural de la empresa  $i$  expresa la reacción en el precio de los rivales ante una variación en el precio de  $i$ , o las expectativas sobre la reacción de la entidad  $j$  ante un cambio inicial de precio de la entidad  $i$ .

La principal ventaja del enfoque de variaciones conjeturales es que no asume ningún tipo específico de interacción con el mercado; sino que permite que sea el investigador y los datos quienes describan la naturaleza de la interacción competitiva. Si bien este enfoque usa un parámetro continuo con sus indudables atractivos (distintos tipos de equilibrio pueden ser identificados con un solo parámetro), no está exenta de defectos. Varios trabajos señalan que cuando el número de empresas aumenta, el modelo de variaciones conjeturales podría no ser identificado. Para superar esta limitación y dado el elevado número de empresas de una industria, una forma de examinar la rivalidad es distinguir entre la forma en que las empresas compiten entre y a través de los grupos estratégicos en una industria (Más y Ruiz, 2011).

Los resultados de la estimación de este parámetro se interpretan como la desviación del equilibrio de Nash. Si la estimación de este parámetro no es significativamente distinta de cero, el comportamiento es coherente con el equilibrio de Nash, lo que significa que la entidad  $i$  ignora totalmente el comportamiento que tienen sus rivales y por lo tanto no reacciona ante cambios en precios de sus rivales. Si la estimación es negativa, se refleja un comportamiento competitivo entre la empresa  $i$  y sus rivales, aproximando el precio al coste marginal (condición característica de la competencia perfecta). Si el resultado de la estimación es positivo, se indica que la empresa espera que los rivales igualen este precio, y por lo tanto cooperen en la obtención de ingresos con un beneficio aceptable. Es decir, se produce un comportamiento colusivo de la empresa con sus rivales (si este valor positivo es exactamente igual a uno, se refleja un comportamiento colusivo perfecto). En el caso de un patrón competitivo asimétrico, el equilibrio de Stackelberg sería el resultado de una estimación en el que el parámetro de variación conjetural sea cero para el seguidor y distinto de cero para el líder. El equilibrio de dominante –fringe se daría cuando la estimación del parámetro sea cero para la dominante y negativo para la fringe.

En un plano operativo, las condiciones de primer orden para la empresa  $i$  en el caso duopolio vienen dadas por:

$$(p_i - c_i) \left( \frac{\partial q_i}{\partial p_i} + \frac{\partial q_i}{\partial p_j} \frac{\partial p_j}{\partial p_i} \right) + q_i = 0, j \neq i, i = 1, 2.$$

$$(p_i - c_i) \left( b_{ii} + b_{ij} \frac{\partial p_j}{\partial p_i} \right) + q_i = 0, j \neq i, i = 1, 2.$$

$\partial p_j / \partial p_i$  se interpreta como las conjeturas de la empresa  $i$  sobre cómo la empresa  $j$  cambiará su precio en respuesta a un cambio en el precio de  $i$ . Por supuesto, el enfoque de variaciones conjeturales puede ser utilizado con diversas decisiones estratégicas de marketing y no sólo con el precio.

Las dos ecuaciones de demanda junto con las condiciones de primer orden se estiman en un sistema de ecuaciones simultáneas y utilizando un enfoque de estimación de variables instrumentales, como 3SLS, FIML o GMM. En cuanto a la selección de variables instrumentales, conviene indicar que no existe un procedimiento general para decidir si una variable es válida o no para su consideración como instrumento. En este sentido, no puede decirse que haya variables instrumentales ciertas, tan solo hay instrumentos más válidos que otros (Bronnenberg et al., 2005).

### Parámetro de Conducta

Este enfoque, propuesto por Porter (1983), es muy similar al enfoque de variaciones conjeturales. La condición de primer orden de la empresa  $i$  es:

$$(p_i - c_i) \left( \frac{\partial q_i}{\partial p_i} + \frac{\partial q_i}{\partial p_j} \frac{\partial p_j}{\partial p_i} \right) + q_i = 0, j \neq i, i = 1, 2.$$

$$(p_i - c_i) \frac{\partial q_i}{\partial p_i} (1 + \theta) + q_i = 0, i = 1, 2.$$

$$\text{Donde } \theta = - \left( \frac{\partial q_i / \partial p_j}{\partial q_i / \partial p_i} \right) \frac{\partial p_j}{\partial p_i}$$

Si la estimación del parámetro es cero, se está alcanzando el equilibrio de Nash. Si el resultado de la estimación del parámetro es positivo, se está alcanzando un margen precio-coste mayor que la alcanzada en el equilibrio de Nash y, por lo tanto, la competencia es más suave que en Nash. Si la estimación es negativa, el margen precio-coste es más pequeño que en Nash y, por lo tanto, la competencia es mayor.

### Enfoque del Beneficio Ponderado

Este enfoque modeliza un parámetro continuo que evita algunas de las críticas que se realizan sobre el enfoque de variaciones conjeturales, pero posibilita la medición del nivel de cooperación en un mercado.

Para un mercado con dos empresas, la función de beneficios es:

$$\pi_i = (p_i - c_i)q_i + \emptyset_i(p_j - c_j)q_j, j \neq i, i = 1, 2$$

Y su condición de primer orden:

$$\partial \pi_i / \partial p_i = (p_i - c_i)b_{ii} + \emptyset_i(p_j - c_j)b_{ij} + q_j, j \neq i, i = 1, 2$$

Se parte del supuesto de que la empresa  $i$  tiene un peso  $\emptyset_i$  en los beneficios de la empresa  $j$ . Si  $\emptyset_i = \emptyset_j = 1$  significa que están interactuando en una colusión perfecta. Si  $\emptyset_i = \emptyset_j = 0$  significa que las empresas se comportan independientemente. Cuando

$0 < \phi_i < 1$ ,  $i=1,2$ , las empresas muestran niveles intermedios de cooperación. Finalmente, cuando ambos son negativos, las dos empresas compiten agresivamente.

Para concluir este apartado, se enumeran las ventajas e inconvenientes que se derivan del uso de este tipo de modelos. Entre las **ventajas**, destacan los siguientes:

- Se trata de modelos estructurales basados en algún tipo de comportamiento optimizador.
- Además, son modelos estratégicos en los que las empresas deben tener en cuenta la interdependencia de las decisiones con el resto de empresas: la decisión de una empresa causará una reacción de sus competidores y viceversa.
- Estos modelos proporcionan la oportunidad de comparar empíricamente y poner a prueba teorías alternativas de comportamiento estratégico empresarial.
- Se trata de estudios cuyos resultados tienen una interpretación muy sencilla.
- Es relativamente sencillo descomponer los determinantes del poder de mercado y la rentabilidad a raíz de los resultados obtenidos en estos estudios.

Por otro lado, entre las principales **desventajas** extraídas del uso de este tipo de modelos, destacan los siguientes:

- No está claro ni cómo ni cuándo los resultados de un estudio de este tipo pueden generalizarse.
- Simultaneidad: Las empresas toman sus decisiones estratégicas de marketing mix de forma simultánea. Así, la decisión de una empresa es función de las decisiones de sus rivales. Además, las posibles decisiones estratégicas de una empresa afectan a su demanda, así como su demanda también afecta a sus decisiones. Es decir, la demanda alcanzada y las decisiones estratégicas tomadas por la empresa son simultáneas.
- Endogeneidad: Se trata de modelos estructurales en los que las opciones de cada empresa tienen que ser tratadas como variables endógenas.
- El problema más complejo que presentan estos enfoques se deriva de la elevada dificultad (debido a la falta de grados de libertad) de estimar la totalidad de interacciones competitivas entre todas las empresas integrantes de una industria con elevado número de empresas. Así pues, la estimación de estos modelos en estas circunstancias, justificaría la imposición de algún tipo de restricción (Kadiyali et al., 2001). Una forma de hacer operativa la estimación de todas las interacciones competitivas entre las empresas rivales consiste en distinguir cómo las empresas compiten entre y dentro de los grupos estratégicos formados en una industria (Putsis y Dhar, 1998).

## Conclusiones

El enfoque de la Nueva Organización Industrial Empírica ha proporcionado numerosos trabajos basados en el marco de la Teoría de Juegos que han mejorado la comprensión del comportamiento competitivo entre las empresas utilizando diversas variables de decisión. La utilización de este tipo de modelos permite, entre otras aplicaciones, que las empresas conozcan el efecto último de cualquier acción competitiva y, consecuentemente, evalúen el impacto o efectividad de un cambio en la estrategia de la empresa (Leeflang y Wittink, 1992). Esto implica considerar la respuesta probable del rival de la empresa y, una vez conocido el tipo de interacción competitiva que está dándose en la práctica en una industria (“líder-seguidor”, “dominante-fringe”, equilibrio

de Nash, etc.), se pueden aplicar modelos que permitan conocer la conducta estratégica óptima así como las reacciones óptimas de la empresa dada la respuesta más probable del rival (Putsis y Dhar, 1998).

En resumen, existe una necesidad y a la vez una oportunidad para los investigadores de profundizar en determinados aspectos relacionados con la competencia. Estudios de rivalidad entre empresas que incluyan acciones y reacciones competitivas permiten que los gestores de la empresa puedan desarrollar diferentes “juegos” en el mercado, medir el efecto de sus acciones y de las respuestas de sus rivales y comparar el atractivo de diferentes programas de marketing de una manera más informada (Ruiz Moreno, 2007). Así pues, el desarrollo de estudios cuyo objetivo último sea la descripción empírica del patrón de interacción competitiva entre las empresas de una industria puede ser de gran valor para los gestores de empresa debido a que el conocimiento de dicho comportamiento competitivo puede ser muy importante para alcanzar una mayor efectividad de los esfuerzos de marketing desarrollados por dichos gestores (Putsis y Dhar, 1998).

# CHAPTER 11

## Agenda periodística y política en crisis epidémicas: el ébola

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Las influencias de los medios de comunicación en la sociedad han sido estudiadas bajo diferentes marcos teóricos. Mauro Wolf, en su obra «Los efectos sociales de los media» destaca, entre otros, los siguientes mecanismos de influencia: a) la dependencia de la sociedad respecto a los medios como sistema de información sobre cualquier ámbito (incluida, por tanto, la información de salud); b) el efecto de los medios en el establecimiento de la agenda pública, o la lista de temas que son prioritarios para una determinada sociedad en un momento concreto; c) la influencia en las representaciones sociales de la realidad (p. ej., con la recreación de ciertos estereotipos y roles sociales), y d) los efectos sobre la creación de la «opinión pública», al difundir, por una parte, determinadas opiniones y, por otra, por ser uno de los sistemas utilizados individualmente a la hora de percibir cuál es la opinión de la mayoría (poll-taker). (Revuelta G, Alonso I, Tomás S, Guerrero M, Rohlfs I, 2014).

La prensa puede mostrar fenómenos como una serie de hechos aislados o como una secuencia de sucesos que siguen un patrón determinado. La aceptación de que un fenómeno es un problema social depende de que sea reconocido como tal por parte de la comunidad, pero sobre todo de que atente contra los valores e intereses de los grupos dominantes, con influencia sobre la opinión pública y con autoridad suficiente como para emprender acciones para su control. (Vives C, Ruiz MT, Álvarez C, Martín M, 2005).

La situación está bien descrita en un artículo titulado acertadamente "Una relación difícil: las tensiones entre la medicina y los medios de comunicación", que apareció en la revista TheLancet hace 10 años. Mientras que los medios de comunicación se vieron limitados por la necesidad de líneas de tiempo, simplicidad, brevedad y su búsqueda de historias personales, los científicos vieron los medios de comunicación como un conducto para la transmisión de información al público de una manera que pueda ser entendida fácilmente. (Vives C, Ruiz MT, Álvarez C, Martín M., 2006)

Es por ello que los epidemiólogos deben aprender ciencias interdisciplinarias sobre la teoría y la metodología de la comunicación. También tienen que interactuar con gente de los medios en todos sus procesos. (Zhang SX, Li XM, Luo NC, Mei SJ, Jiang LJ., 2013). Esto ayudará a la creación de noticias veraces y comprensibles para el público, lo que ahonda en una mayor cobertura y finalmente una mayor prevención primaria en todo tipo de cuestiones de salud.

“Un operario muere aplastado por una máquina de 1.500 kilos de peso”. Es la línea de apertura de una noticia publicada en el periódico ABC, el 7 de mayo de 2014. Ilustra cómo uno de los principales periódicos de España se acerca al tema de la salud laboral, a través de un accidente laboral. La sociedad civil, el mundo académico, los sindicatos, los medios de comunicación y el poder judicial, entre otros actores sociales, también

están involucrados y han guiado el debate sobre esta cuestión (De Conto A, Fischer FM., 2012) que nos disponemos a estudiar.

Para empezar, vale la pena hacer algunas precisiones conceptuales que nos ayuden a interpretar mejor los datos disponibles. El hecho de usar el término «lesión por accidente de trabajo» no es casual. Desde hace años, el British Medical Journal viene recomendando no utilizar el término «accidente» (accident at work o workaccident), por sus connotaciones de algo inevitable ya que todas las Lesiones por Accidente de Trabajo son, al menos teóricamente, evitables. Por ello, dicha revista propuso su sustitución por «lesión» (occupationalinjury) y que ha sido ampliamente aceptada. En nuestro país el término lesión laboral no tiene cabida, por ello usamos el término Lesión por Accidente de Trabajo -LAT-.

La Ley General de la Seguridad Social define la enfermedad profesional en los siguientes términos: “Se entenderá por enfermedad profesional la contraída a consecuencia del trabajo ejecutado por cuenta ajena [...]”. En España, a efectos legales, se conoce como enfermedad profesional aquella que, además de tener su origen laboral, está incluida en una lista oficial publicada por el ministerio de trabajo dando, por tanto, derecho al cobro de las indemnizaciones oportunas. Esta lista viene dada a partir de la elaboración del Real Decreto 1299/2006 de 10 de noviembre, por el que se aprueba el cuadro de enfermedades profesionales en el sistema de la Seguridad Social y se establecen criterios para su notificación y registro. Esta nueva norma conlleva una modernización y mejora de la calidad del Sistema en su conjunto, suponiendo la convergencia con Europa y mejorando incluso la propia Recomendación de la Comisión Europea. Así mismo, se incluye un procedimiento de actualización de la lista que habilita su mantenimiento en sintonía con la lista de enfermedades europea. (Gobierno de España. Ministerio de Sanidad, Servicios Sociales e Igualdad, 2015). Dado que el abanico de enfermedades profesionales es amplísimo nos vamos a centrar en el grupo de enfermedades causadas por agentes biológicos, cuyo agente son enfermedades infecciosas causadas por el trabajo y que se ocupan de la prevención, asistencia médica y actividades en las que se ha probado un riesgo de infección. Como este grupo sigue siendo grande nos vamos a centrar en una enfermedad en concreto: el ébola.

### **Enfermedad por el virus del Ébola**

La enfermedad por el virus del Ébola (EVE), antes llamada fiebre hemorrágica del Ébola, es una enfermedad grave, a menudo mortal en el ser humano, cuya tasa de letalidad puede llegar al 90%.

El virus se detectó por vez primera en 1976 en dos brotes simultáneos ocurridos en Nzara (Sudán) y Yambuku (República Democrática del Congo), (Organización Mundial de la Salud, 2014) donde se detectaron 3418 casos y 2830 muertes con una tasa de letalidad del 83%. Este brote fue causado por el virus Ébola-Zaire, una de las cepas más epidémicas y mortales de la historia. Los brotes de fiebres hemorrágicas virales tienen una tasa de mortalidad de entre el 41 y el 89%. (King J. W, Rafeek H., 2015). La aldea en que se produjo el segundo de ellos está situada cerca del río Ébola, que da nombre al virus.

El género Ebolavirus es, junto con los géneros Marburgvirus y Cuevavirus, uno de los tres miembros de la familia Filoviridae (filovirus). El género Ebolavirus comprende cinco especies distintas:

- ebolavirusBundibugyo (BDBV);
- ebolavirus Zaire (EBOV);
- ebolavirusReston (RESTV);
- ebolavirus Sudan (SUDV), y
- ebolavirusTaiForest (TAFV). (Thomson Reuters, 2014).

### Brote de ébola en África Occidental de 2014

En 2014 surgió el mayor brote de la historia de la cepa ebolavirus Zaire y también el mayor brote de ébola hasta entonces, afectando inicialmente a Guinea-Conakry y expandiéndose posteriormente a Sierra Leona, Liberia y Nigeria.(CDC, 2015).

El 8 de agosto de 2014, la OMS decretó la situación como "emergencia pública sanitaria internacional" y recomendó medidas para detener su transmisión en medio de la expectante preocupación mundial ante el riesgo de pandemia global. Entre ellas, pedía a los países donde se habían detectado afectados que declarasen emergencia nacional y hacía una llamada a la solidaridad internacional. (World Health Organization, 2014).

### *Transmisión*

El virus del Ébola se introduce en la población humana por contacto estrecho con órganos, sangre, secreciones u otros líquidos corporales de animales infectados. Posteriormente, el virus se propaga en la comunidad mediante la transmisión de persona a persona, por contacto directo (a través de las membranas mucosas o de soluciones de continuidad de la piel) con órganos, sangre, secreciones, u otros líquidos corporales de personas infectadas, o por contacto indirecto con materiales contaminados por dichos líquidos. Los hombres pueden seguir transmitiendo el virus por el semen hasta siete semanas después de la recuperación clínica.

La infección del personal sanitario al tratar a pacientes con EVE ha sido frecuente cuando ha habido contacto estrecho y no se han observado estrictamente las precauciones para el control de la infección. (Organización Mundial de la Salud, 2014).

### *Número básico de reproducción - $R_0$*

El número de reproducción básica  $R_0$  es el número de casos secundarios que un caso produciría en una población completamente susceptible. Depende de la duración del periodo infeccioso, la probabilidad de infectar a un individuo susceptible, durante un contacto, y el número de nuevos individuos susceptibles en contacto por unidad de tiempo. Por lo tanto  $R_0$  puede variar considerablemente para diferentes enfermedades infecciosas, sino también para la misma enfermedad en diferentes poblaciones. (Dietz k, 1993).

El número básico de reproducción -  $R_0$  del ébola es bajo comparado con otras enfermedades contagiosas como SARS, SIDA, o la gripe española de 1918, esto significa que cada caso individual produce menos contagios que estas enfermedades durante el período de infección del paciente. En el caso del ébola el  $R_0$  se encuentra entre 1.2 y 1.9 lo que significa que cada persona infectada, en promedio contagiara a entre 1.2 y 1.9 personas durante la duración de la misma. (Towers S, Patterson-Lomba O, Castillo-Chavez C., 2014).

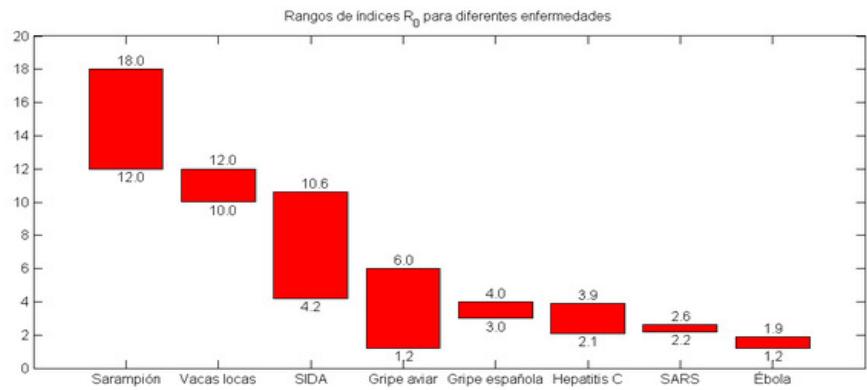


Figura: Número básico de reproducción para diferentes enfermedades contagiosas (Towers S, Patterson-Lomba O, Castillo-Chavez C., 2014).

#### *Signos y síntomas*

La EVE es una enfermedad vírica aguda grave que se suele caracterizar por la aparición súbita de fiebre, debilidad intensa y dolores musculares, de cabeza y de garganta, lo cual va seguido de vómitos, diarrea, erupciones cutáneas, disfunción renal y hepática y, en algunos casos, hemorragias internas y externas. Los resultados de laboratorio muestran disminución del número de leucocitos y plaquetas, así como elevación de las enzimas hepáticas.

Los pacientes son contagiosos mientras el virus esté presente en la sangre y las secreciones. El virus del Ébola se ha aislado en el semen hasta 61 días después de la aparición de la enfermedad en un caso de infección contraída en el laboratorio.

El periodo de incubación (intervalo desde la infección hasta la aparición de los síntomas) oscila entre 2 y 21 días.

#### *Diagnóstico*

Antes de establecer un diagnóstico de EVE hay que descartar el paludismo, la fiebre tifoidea, la shigelosis, el cólera, la leptospirosis, la peste, las rickettsiosis, la fiebre recurrente, la meningitis, la hepatitis y otras fiebres hemorrágicas víricas.

Las infecciones por el virus del Ébola solo pueden diagnosticarse definitivamente mediante distintas pruebas de laboratorio, a saber:

- prueba de inmunoadsorción enzimática (ELISA);
- pruebas de detección de antígenos;
- prueba de seroneutralización;
- reacción en cadena de la polimerasa con transcriptasa inversa (RT-PCR);
- aislamiento del virus mediante cultivo celular.

Las muestras de los pacientes suponen un enorme peligro biológico, y las pruebas tienen que realizarse en condiciones de máxima contención biológica.

#### *Prevención y tratamiento*

No hay vacuna contra la EVE. Se están probando varias, pero ninguna está aún disponible para uso clínico. Los casos graves requieren cuidados intensivos. Los

enfermos suelen estar deshidratados y necesitar rehidratación por vía intravenosa u oral con soluciones que contengan electrolitos. Tampoco hay ningún tratamiento específico, aunque se están evaluando nuevos tratamientos farmacológicos. (Organización Mundial de la Salud, 2014).

En el 2014 en los Estados Unidos fue probado un suero de manera experimental en dos personas contagiadas por este virus. Dada la situación de emergencia, la FDA ha permitido saltarse la vía habitual de ensayos clínicos y probar su seguridad y eficacia. En España en 2014 también se aplicó este suero a un paciente, que sin embargo 2 días después falleció. El nombre comercial de este suero es ZMapp. (Thomson Reuters, 2014).

Un fármaco que se está empleando experimentalmente en algunos casos es el favipiravir, medicamento antivírico que ha mostrado eficacia en animales. (Oestereich L, Lüdtke A, Wurr S, Rieger T, Muñoz-Fontela C, Günther S., 2014). También se ha ensayado el Zmapp (Mapp Biopharmaceutical, 2014) y el agente antiviral brincidofovir. (Vinluan F., 2014). Otros fármacos que se están investigando son el clomifeno y toremifeno, los cuales podrían inhibir la progresión de la enfermedad según algunos estudios iniciales en animales. (Johansen LM, Brannan JM, Delos SE, Shoemaker CJ, Stossel A, Lear C, Hoffstrom BG, et al., 2013).

### *Prevención*

#### *Control del virus del Ébola de Reston en animales domésticos*

No hay ninguna vacuna para animales contra el RESTV. Se considera que la limpieza y desinfección regulares (con hipoclorito sódico u otros detergentes) de las granjas de cerdos y monos es eficaz para inactivar el virus. Si se sospecha que se ha producido un brote, los locales deben ponerse en cuarentena inmediatamente.

#### *Reducción del riesgo de infección humana por el virus del Ébola*

A falta de un tratamiento eficaz y de una vacuna, la concienciación sobre los factores de riesgo de esta infección y sobre las medidas de protección que las personas pueden tomar es la única forma de reducir el número de infecciones y muertes humanas.

#### *Control de la infección en centros de atención médica*

La transmisión del virus del Ébola de persona a persona se asocia principalmente al contacto directo o indirecto con sangre o líquidos corporales. Se han notificado casos de transmisión al personal sanitario en situaciones en las que no se habían adoptado medidas apropiadas de control de la infección.

No siempre es posible identificar precozmente a los pacientes con EVE porque los síntomas iniciales pueden ser inespecíficos. Por este motivo, es importante que los profesionales sanitarios y los centros observen en todo momento las precauciones habituales en los pacientes, independientemente de su diagnóstico. Entre ellas se encuentran la higiene básica de las manos, la higiene respiratoria, el uso de equipos de protección personal (en función del riesgo de salpicaduras u otras formas de contacto con materiales infectados) y prácticas de inyección e inhumación seguras. Cuando tengan contacto estrecho (menos de 1 metro) con pacientes con EVE, los profesionales sanitarios deben protegerse la cara (con máscara o mascarilla médica y gafas) y usar bata limpia, aunque no estéril, de mangas largas y guantes (estériles para algunos procedimientos)

Quienes trabajan en el laboratorio también corren riesgo. Las muestras tomadas a efectos de diagnóstico de personas o animales con infección presunta o confirmada por el virus del Ébola deben ser manipuladas por personal especializado y procesarse en laboratorios adecuadamente equipados.

#### *Respuesta de la OMS*

La OMS aporta conocimientos especializados y documentación para apoyar la investigación y el control de la enfermedad.

El documento “Interim infection control recommendations for care of patients with suspected or confirmed Filovirus (Ebola, Marburg) haemorrhagic fever”, marzo de 2008, que está siendo actualizado, contiene recomendaciones acerca de cómo evitar la infección cuando se proporciona asistencia médica a pacientes con EVE presunta o confirmada.

La OMS ha elaborado una lista de verificación de las precauciones generales que se han de adoptar en la asistencia médica (en fase de actualización). Esas precauciones están concebidas para reducir el riesgo de transmisión de agentes patógenos, entre ellos los de origen sanguíneo; su aplicación universal ayudará a prevenir la mayoría de las infecciones transmitidas por exposición a sangre o líquidos corporales. (Organización Mundial de la Salud, 2014).

#### *Datos Epidemiológicos:*

##### *Ébola*

Según el recuento de casos de actualizados en conjunto el CDC con la Organización Mundial de la Salud basados en la información reportada por los Ministerios de Salud, a fecha del 18 de Marzo de 2015, hay un total de 24754 casos sospechosos, probables y confirmados desde el inicio de la crisis epidemiológica, de los cuales, más de 14.000 han sido confirmados por laboratorio. Así mismo hay un total de 10.236 personas fallecidas a causa del EVE. (CDC, 2014).

##### *Salud Laboral*

En España, según los datos proporcionados por el Ministerio de Empleo y Seguridad Social, el número de partes comunicados de lesiones de accidentes laborales en el año 2014, con y sin baja, suma un total de 1.180.602 partes comunicados (482.578 y 698.024 respectivamente). Si realizamos una comparativa con el año anterior, observamos que, en el año 2013 hay un total de 1.156.574 partes comunicados, de los cuales con baja 468.030 y sin baja 688.544 partes, lo que supone que en el 2014 ha habido un aumento de los partes en un 3,1 %en los partes comunicados con baja y un aumento del 1,4% de los partes comunicados sin baja con respecto al año anterior.<sup>2</sup> (Gobierno de España. Ministerio de Empleo y Seguridad Social, 2014).

De acuerdo con la información proporcionada a través de las aplicaciones CEPROSS (Comunicación de Enfermedades Profesionales en la Seguridad Social) y PANOTRATSS (Comunicación de patologías no traumáticas causadas por el trabajo),

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<sup>2</sup>La interpretación de las variaciones debe realizarse con cautela, dado que los datos de 2013 son datos consolidados y por tanto definitivos, mientras que los correspondientes a 2014 son provisionales de avance debido a que, al cierre de la estadística, no se han incorporado todos los accidentes que hayan causado baja en el período de referencia, al no haberse recepcionado por la autoridad laboral competente

en el año 2014 se han producido un total de 22.949 patologías causadas por el trabajo, 17.260 expedientes de enfermedades profesionales y 5.689 expedientes de patologías no traumáticas causadas o agravadas por el trabajo. Comparando con Europa, Francia y España son los países con mayor número de enfermedades causadas por el trabajo declaradas. (Ministerio de la Seguridad Social, 2014).

Los accidentes laborales causan en nuestro país un enorme impacto sanitario y económico para los trabajadores, las empresas y la sociedad en general. (ABC, 2014). El coste de los accidentes incluye los costos directos, como los trabajadores, compensación económica, seguros de accidentes, pérdida de productividad debido al ausentismo, la discapacidad y la muerte, y los costos sociales y personales de estrés, pérdida de la capacidad física o mental y rupturas familiares. Los medios de comunicación representan un vehículo potencialmente muy rentable para llegar a un gran número de la población. (Shea R, Chapman S., 2001)

Por lo general, estas historias son reportadas en los medios de comunicación locales, y pocos obtienen cobertura adicional o seguimiento. Ha habido casos, sin embargo, en que los periodistas decidieron cavar más profundo en una historia de seguridad y salud. Las historias resultantes tuvieron un papel importante en la sensibilización de la opinión pública, los trabajadores, los líderes de la industria y los responsables políticos.

El caso de Las Vegas es una representación clarísima de la influencia de los medios de comunicación. En 2007-2008, la construcción estaba en auge en Las Vegas. Para mayo de 2008, 11 trabajadores de la construcción murieron en el trabajo en 17 meses, cinco de los cuales trabajaron en el proyecto CityCenter - el más grande en la historia de Las Vegas y el sitio de la construcción comercial más grande de Estados Unidos. Una reportera de Las Vegas Sun, Alexandra Berzon, miró cada caso y montó un informe de investigación convincente que mostró un patrón de violaciones de seguridad. A partir de marzo de 2008, ella escribió más de 50 historias que exponen las condiciones inseguras de trabajo, falta de supervisión, y el impacto que las muertes de los trabajadores tienen en las familias. También pusieron el tema en un contexto nacional, la exploración de opciones de regulación mediante la comparación de la ciudad y el condado. Estos reportes llamaron la atención y alentaron los medios de comunicación nacionales, como The New York Times y The Wall Street Journal, con lo que se centró la atención a nivel nacional para el tema. Informes de problemas con la aplicación de la OSHA (Schneider S, Check P., 2010). (Occupational Safety and Health Administration, es decir Administración de seguridad y salud ocupacional, este organismo forma parte del Departamento de Trabajo de los EE.UU), (United States Department of Labor). En el periódico TheSun desencadenó una investigación federal de OSHA que dio lugar a cambios dramáticos en el plan OSHA operado por el estado y un mayor escrutinio de todos los planes estatales de OSHA. Audiencias en el Congreso identificaron la necesidad de cambios en la interpretación nacional de las normas de construcción en acero de OSHA. Berzon y TheSun ganaron el Premio Pulitzer de Servicio Público por su investigación de las muertes de la construcción en la franja de Las Vegas. (Schneider S, Check P., 2010).

#### *Ébola como enfermedad laboral. Caso de España y EEUU:*

El 6 de octubre de 2014, la Organización Mundial de la Salud (OMS) fue informada del primer caso confirmado autóctono de enfermedad por el virus del Ébola (EVE) en España. Este caso es el primero de transmisión de persona a persona fuera de África. La paciente, auxiliar de enfermería (Teresa Romero), no tiene antecedentes de viaje a

África Occidental, pero participó en la atención médica a un ciudadano español con EVE que contrajo la infección en Sierra Leona, fue evacuado a Madrid (España) el 22 de septiembre de 2014 y falleció el 25 del mismo mes. La auxiliar estuvo en contacto con este paciente en dos ocasiones: el 24 y el 25 de septiembre. Se dice que en ambas ocasiones utilizó equipo de protección personal adecuado.

De acuerdo con el protocolo nacional de España para los casos de EVE, la auxiliar se consideró como un contacto de bajo riesgo y fue vigilada en consonancia. El 29 de septiembre presentó fiebre y el 6 de octubre fue ingresada en aislamiento en el Hospital de Alcorcón (Madrid). Posteriormente fue trasladada al Hospital de La Paz-Carlos III, también en Madrid, donde se puso en aislamiento. El 6 de octubre se obtuvieron muestras diagnósticas que fueron enviadas al laboratorio nacional de referencia. Los resultados fueron positivos para Ebolavirus ese mismo día. Las autoridades de salud pública españolas están investigando cómo se produjo la transmisión. (Organización Mundial de la Salud, 2014).

El 10 de octubre de 2014 el CDC es informado de que un trabajador de salud del Hospital Presbiteriano de Texas que atendió al paciente cero dio positivo por Ébola. El trabajador de la salud fue aislado después del informe inicial de fiebre y, posteriormente, se trasladó a los Institutos Nacionales de Salud (NIH) Centro Clínico. La trabajadora se recuperó y fue dada de alta el 24 de octubre.

Así mismo el 15 de octubre 2014 el CDC vuelve a ser reportado con un segundo trabajador de la salud que atendió a la paciente cero en el Hospital Presbiteriano de Texas dio positivo por Ébola. Este segundo trabajador de la salud fue trasladado al hospital de Emory en Atlanta, Georgia. Adicionalmente, el trabajador de la salud había viajado en avión desde Dallas a Cleveland el 10 de octubre y desde Cleveland a Dallas el 13 de octubre. El CDC trabajó para asegurar que todos los pasajeros y tripulantes de los dos vuelos fueron contactados por profesionales de la salud pública para responder a sus preguntas y organizar el seguimiento según sea necesario. La trabajadora se recuperó y fue dada de alta el 28 de octubre. Para el 3 de noviembre todos los pasajeros de todos los vuelos completaron el período de seguimiento de 21 días. (CDC, 2014).

Resulta llamativo comprobar que estos contagios se han producido precisamente con ocasión de la prestación de servicios de las trabajadoras enfermas, pues ha sido precisamente la labor de atención a uno de los enfermos repatriados en el caso español y a un cooperante enfermo de ébola en el caso estadounidense, lo que les ha puesto en contacto con el virus.

Por este motivo, se hace ahora imprescindible recordar que todo tipo de empresa, tanto de titularidad privada como pública está sujeta a las obligaciones que marca la vigente Ley de Prevención de Riesgos Laborales (LPRL), con el fin de alcanzar los objetivos de seguridad y salud en el trabajo, quedando obligada a seguir estrictamente sus indicaciones, tanto por lo que respecta al personal laboral que estuviese prestando servicios en sus instalaciones, como frente a los funcionarios y, también, sobre el llamado personal estatutario que presta servicios en nuestra Administración pública (art. 3.1 LPRL).

Debe admitirse que la facilidad de desplazamiento de las personas entre ciudades, países y continentes, multiplica exponencialmente el potencial riesgo de contagio. Ha sido por tanto la rapidez y variedad de los transportes de personas entre los distintos países del mundo, el factor que ha contribuido notablemente a extender una enfermedad, cuyos

brotes, históricamente, quedaban limitados al reducido número de personas que habían podido estar en contacto directo con un enfermo. Es precisamente el traslado fuera de África de los enfermos el factor que detonó el contagio secundario que se detectó en España y en Estados Unidos. Y es precisamente esta situación la que obliga a reflexionar sobre diversas cuestiones relacionadas, no ya con la seguridad pública nacional, sino en particular con los nuevos riesgos a los que se pueden enfrentar los profesionales de la sanidad debido a situaciones como las descritas.

Teniendo en cuenta el marco normativo, se ha de admitir que en el momento en el que se procede a la repatriación de un enfermo de ébola para recibir tratamiento médico dentro del Sistema Nacional de Salud, se expone a los profesionales sanitarios que están en contacto con él a un nuevo riesgo para su salud, claramente vinculado al desarrollo de su actividad profesional, que obviamente se ha de prevenir y evitar. (Selma A., 2014). Como se habló anteriormente, las LAT y las enfermedades profesionales son prevenibles si se aplica correctamente la normativa. ¿Fue realmente así? ¿Se aplicó de forma correcta la normativa? Lo cierto es que el caso español fue muy mediático y tuvo una gran repercusión en los medios de comunicación, en la sociedad y en la política.

La influencia de los medios de comunicación sobre las cogniciones de la audiencia, las actitudes y los comportamientos en el ámbito de la política, las relaciones raciales, la ciencia y la salud ha sido ampliamente documentada. El establecimiento y la elaboración de estudios de Agenda muestran la influencia medios de comunicación y cómo la gente desarrolla prioridades con historias de los medios, por ello de servir como una fuente importante de emisión de marcos. Los medios de comunicación son intermediarios importantes para la traducción de la información importante de la salud y de la ciencia en formas fácilmente diseminadas y comprensibles para el público.

### **Establecimiento de la Agenda**

El establecimiento de la agenda se puede clasificar en tres temas distintos pero relacionados que examinan la relación entre el (a) del orden del día público creación cuestiones retratadas en los medios de comunicación y las prioridades de los ciudadanos, (b) la agenda política de cobertura de establecer medios de comunicación y su influencia en la agenda legislativa de órganos políticos, y (c) del orden del día los medios de comunicación creación antecedentes tales como los roles institucionales y procesos que son influyentes en la selección de los temas y contenidos incluidos en los medios de comunicación (Kosicki, 1993).

Los medios de comunicación son un conjunto influyente y heterogéneo de actores estatales no nacionales que funcionan como conductos principales a ambos discursos, formales e informales dentro de los espacios de la política cultural y geopolítica. Los medios contribuyen a menudo en las articulaciones de identidad política y la cultura en la sociedad e influyen de manera significativa en la comprensión del público del curso de la ciencia y de la política. Examinar noticias y textos de los medios ofrecen oportunidades para interrogar cómo se traducen las narrativas particulares, y cómo hacer (in)visibles ciertos discursos. (Boykoff MT., 2008).

Si los planes gubernamentales, y específicamente los planes de salud, son identificados como el resultado de la «construcción política» de los problemas que han logrado establecerse en la agenda política, las leyes se integran en la fase de «formulación política» de esos mismos problemas. Las Cortes Generales se identifican en la Constitución Española como las instituciones que «representan al pueblo español» y que

«ejercen la potestad legislativa del Estado, aprueban presupuestos y controlan la acción del gobierno». Estas funciones, que son ejercidas por los grupos parlamentarios mediante diferentes tipos de iniciativas parlamentarias, se hacen transparentes en el contexto parlamentario. Concretamente, estas acciones se materializan en los diferentes tipos de iniciativas parlamentarias que comprenden dichas funciones. En este sentido, el Parlamento, tomado como objeto de estudio, constituye una oportunidad para el análisis de políticas públicas, en concreto para el estudio de los procesos de formulación y toma de decisiones vinculadas al poder legislativo del Estado. A pesar de estas potencialidades, el Parlamento es un contexto todavía poco explorado en investigación en salud pública. (Vives C., Gil D., Carrasco M, Álvarez C., 2014).

Teniendo en cuenta las oportunidades que ofrece el contexto parlamentario para el análisis de las discusiones generadas en torno a estos eventos políticos, así como los medios de comunicación en materia de salud laboral se plantea este estudio con el siguiente objetivo.

Analizar la evolución de la enfermedad del virus ébola, como enfermedad profesional cuyo contagio se realizó fuera de foco en el espacio discursivo público en España y Estados Unidos. Para dar respuesta a este objetivo, los objetos de estudio van a ser el espacio discursivo político, el mediático, y las redes sociales, puesto que es comúnmente reconocida su importancia en la construcción social de los temas considerados prioritarios por las sociedades contemporáneas.

# CHAPTER 12

## Análisis de los profesionales de la comunicación corporativa desde el asociacionismo en España

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### Introducción

A lo largo de las últimas dos décadas los investigadores españoles han abordado el desempeño y la evolución de las relaciones públicas y la comunicación corporativa desde diferentes perspectivas (Arceo, 2003, 2004; Castillo, 2004; Costa, 2009, 2011; Matilla, 2010; Moreno, 2004; Míguez, 2007; Noguero, 2004; Castillo y Xifra, 2006; Xifra, 2008; Villafaña, 2000). Sin embargo, el papel de los profesionales en las organizaciones, las disciplinas a las que pertenecen o su formación y las condiciones salariales (Navarro *et al.*, 2012) han sido temas, que, desde el punto de vista académico, se han investigado tangencialmente en España (Navarro *et al.*, 2012).

En España la investigación empírica sobre la situación del sector ha sido liderada principalmente por las dos asociaciones profesionales mayoritarias de ámbito nacional: la Asociación de Directivos de Comunicación (DIRCOM) y la Asociación de Consultores en Relaciones Públicas y Comunicación (ADECEC) (Gutiérrez-García, 2010).

Esta afirmación no es intrascendente si tenemos en cuenta que en España la práctica profesional parece haber ido por delante de la teoría (Gutiérrez y Rodríguez, 2009) y esta circunstancia tienen una sencilla explicación ya que hablamos de una disciplina que ha nacido de la necesidad de las empresas e instituciones (Gutiérrez y Rodríguez, 2009; Costa, 2011).

Como apunta Almansa (2004), la década de los noventa supuso la eclosión del fenómeno asociativo en el sector de la comunicación y las relaciones públicas en España. Así, en 1991 se crea (ADECEC)<sup>3</sup>, considerada actualmente la patronal de las agencias de comunicación en España (Paniagua, 2010; Estanyol y Lalueza, 2014).

En 1992, tan solo un año después, nace DIRCOM<sup>4</sup>, formada por profesionales tanto de las agencias y consultoras como del ámbito estrictamente organizacional. El principal

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<sup>3</sup> La Asociación de Empresas Consultoras en Relaciones Públicas y Comunicación (ADECEC) se fundó en enero de 1991 auspiciada por un grupo de profesionales representantes de las principales empresas consultoras en relaciones públicas en España. Su objetivo es difundir la práctica de la consultoría de comunicación y relaciones públicas en nuestro país. ADECEC es la representante patronal del sector y en la actualidad integra a 26 de las principales empresas consultoras en relaciones públicas en España.

<sup>4</sup> DIRCOM es una asociación profesional que agrupa a los directivos y a los profesionales de la comunicación de las empresas, instituciones y consultoras en España. Nace en 1992 de la iniciativa de un grupo de profesionales de la comunicación motivados por la creciente importancia y alcance de sus responsabilidades en la empresa y la sociedad. DIRCOM tiene como visión valorizar la función de la comunicación y del DIRCOM en las organizaciones. En la actualidad, cuenta con más de 900 socios y 7 delegaciones territoriales.

objetivo de DIRCOM es la consolidación de la comunicación “como herramienta estratégica para la gestión de las organizaciones” (DIRCOM, 2014).

De la mano de estas dos asociaciones profesionales se elaboran las primeras investigaciones cuyo propósito es conocer el estado de la profesión (Almansa, 2004; Estanyol y Lalueza, 2014 y Gutiérrez, 2010) de modo que la investigación pasa a convertirse desde el primer momento en una prioridad. En 2009 ADECEC y DIRCOM firman un acuerdo de colaboración con el objetivo de promover la formación y la investigación en el sector. Este hecho potencia si cabe más los trabajos enmarcados en la denominada “literatura gris” que, desde sus orígenes estas instituciones impulsaron. Trabajos que, por otra parte, sirven como base para otros tantos desarrollados por los académicos (Arceo, 2012; Morales y Enrique 2007; Matilla y Marca, 2011; Mut, 2013). Pese a la importancia que esta literatura gris ha tenido para la profesión y la producción científica, hasta la fecha no se han llevado a cabo estudios que la hayan revisado. En este contexto resulta interesante compilar toda esta documentación y sintetizar su foco de atención, objetivos, metodología y conclusiones para obtener el panorama general de lo que “la profesión sabe en estos momentos sobre sí misma”.

## **Objetivos**

El objetivo de este capítulo es sintetizar la literatura gris producida por las principales asociaciones profesionales del ámbito de la comunicación corporativa y de las relaciones públicas en España. De manera más concreta se pretende:

- a) Identificar los objetos de análisis abordados y los objetivos de las investigaciones.
- b) Observar la metodología, el método y las muestras utilizadas.
- c) Sintetizar los principales resultados.

## **Metodología**

Para cumplir estos objetivos nos servimos de la metodología cualitativa. A partir del análisis descriptivo de la literatura hemos analizado una serie de variables en todos los estudios realizados y publicados por las principales asociaciones del sector.

En primer lugar, se estableció contacto con las dos asociaciones para consultar y comprobar la producción de estudios que ambas organizaciones habían llevado a cabo desde la fecha de su fundación hasta la actualidad. Las propias asociaciones, como fuentes primarias, facilitaron el acceso a todos los informes propios, bien en soporte papel o digital. Los informes correspondientes a los estudios en los que las asociaciones colaboraron (EOI 2010 y Prscope, 2013) se obtuvieron a través de un acceso en línea.

Una vez obtenidos los documentos originales se procedió a su análisis textual. A partir de un protocolo o guión se fueron identificando en los textos la información referente a la metodología, el universo y muestra, y los objetivos planteados en las diferentes investigaciones. Una vez extraído todos los resultados se realizó un análisis comparativo de las investigaciones para describir los cambios y la evolución que se han producido a lo largo del tiempo transcurrido entre los diferentes estudios. Este análisis dio lugar a una reflexión derivada del estudio específico de la tipología, muestra, objetivos y temáticas planteados en cada una de las investigaciones.

## **Resultados**

### **Objetos de análisis y objetivos de las investigaciones**

Desde su fundación en 1992, DIRCOM ha elaborado cinco estudios (1995, 2000, 2005, 2010 y 2015) con el objetivo de analizar el sector de la comunicación corporativa y de las relaciones públicas en España. Asimismo, desde la asociación, se ha colaborado en diferentes investigaciones promovidas por otras instituciones que también analizaban el sector (EOI, 2010; Prscope, 2013).

Por su parte, ADECEC ha llevado a cabo tres investigaciones propias (2002, 2004 y 2008) para obtener una visión global del sector de la consultoría de comunicación en España.

En 2009, tanto ADECEC como DIRCOM colaboraron en el estudio publicado por el Grupo Consultores en 2013. Como podemos extraer de los datos analizados, la mayoría de los estudios realizados por DIRCOM (2000, 2005, 2010 y 2015) tienen como objetivo analizar la práctica de la comunicación en las empresas. Los cuatro estudios dicen querer describir los departamentos de comunicación y la figura del responsable de comunicación. En cualquier caso, esta descripción quieren que sirva para “contribuir al conocimiento de la realidad de la comunicación en las empresas que operan en España, la promoción de la profesión y la formación de sus futuros profesionales” (DIRCOM, 2000 y 2005, 2010 y 2015). Entre otros de los objetivos mencionados también están los siguientes: actualizar las funciones que se les atribuye a los departamentos de comunicación (2010), conocer las perspectivas y tendencias (2010), e incluso, con la recopilación de los datos de los estudios elaborados en los últimos años, poder construir una fotografía de su evolución en la última década (2015).

Por su parte, el primer estudio de ADECEC (2002) tenía como objetivo obtener una visión global y representativa del sector de la consultoría de comunicación en España, si bien los siguientes (2004 y 2008) pretendieron de manera más detallada conocer las actividades de comunicación más demandadas por las organizaciones y reflejar la situación de las consultoras en comunicación respecto a la demanda de servicios.

El estudio externo llevado a cabo por la Fundación EOI (2010), en el que DIRCOM aparece como entidad colaboradora, tiene un doble objetivo: por un lado, identificar cuál es el nuevo rol del dircom y cómo encaja en él la gestión de los intangibles (qué intangibles gestiona el dircom, cómo lo hace y cómo los define y denomina) y, por otro, incidir desde la perspectiva de los dircom en las inquietudes y necesidades formativas que requiere ese nuevo rol.

Por último, el estudio elaborado por Grupo Consultores (PrScope, 2013), en su tercera edición en la que ha colaborado ADECEC y DIRCOM, quiso analizar las tendencias de la industria y la imagen de las consultoras de comunicación y agencias de relaciones públicas en España para conocer mejor las oportunidades existentes entre clientes y consultoras.

Como ya hemos comentado anteriormente, en la primera edición de las investigaciones propias de DIRCOM (2000) y ADECEC (2002) se analizan una serie de ítems que se modificarán en los años sucesivos. Sin embargo, los estudios de las ediciones posteriores (DIRCOM, 2005, 2010 y 2015; ADECEC, 2004 y 2008) mantienen invariables la mayoría de sus ítems, aspecto fundamental para poder comparar los

resultados a lo largo del tiempo, analizar su evolución y convertir los estudios periódicos en un observatorio de la realidad profesional del sector en España. En la tabla 1 se resumen las principales temáticas analizadas en los diferentes estudios. Mientras la asociación DIRCOM incide en investigar el perfil del profesional o del departamento de comunicación, la asociación ADECEC analiza con mayor detalle las disciplinas y funciones que se desarrollan en los departamentos de comunicación (internos o externos), así como los objetivos que se establecen o la relación empresa-consultoras.

**Tabla 1. Principales temáticas analizadas.**

<b>DIRCOM</b>		<b>ADECEC</b>	
2000	<b>Empresas / Instituciones</b> <ul style="list-style-type: none"> <li>- Perfil profesional</li> <li>- Características del departamento de comunicación</li> <li>- Estrategia</li> <li>- Tendencias de futuro</li> </ul>	2002	<b>Empresas/consultoras</b> <ul style="list-style-type: none"> <li>- Evolución histórica y situación del sector</li> <li>- El futuro del sector de la comunicación</li> </ul>
2005 2010 2015	<b>Empresas/Profesionales</b> <ul style="list-style-type: none"> <li>- La organización de la comunicación en la empresa.</li> <li>- Los profesionales de la comunicación corporativa.</li> <li>- La aportación de valor de la comunicación.</li> <li>- Formación, investigación y consultoría sobre comunicación.</li> <li>- Perspectivas para la comunicación.</li> </ul>	2004 2008	<b>Empresas</b> <ul style="list-style-type: none"> <li>- Departamento de comunicación en las empresas.</li> <li>- Disciplinas/funciones y quien las desempeña.</li> <li>- Objetivos planteados.</li> <li>- Evaluación de resultados.</li> </ul> <b>Consultoras</b> <ul style="list-style-type: none"> <li>- Tipos de consultoras.</li> <li>- Criterios y métodos de contratación.</li> <li>- Relación empresas-consultoras.</li> </ul> <p>El futuro de la comunicación y las RRPP</p>
<b>EOI</b>		<b>Grupo Consultores</b>	

<p><b>2010</b></p> <p><b>Socios Dircom/ periodistas</b></p> <ul style="list-style-type: none"> <li>- El responsable de comunicación en la empresa.</li> <li>- Relación del DIRCOM con los activos y recursos intangibles.</li> <li>- Percepciones e inquietudes de los DIRCOM.</li> <li>- Futuro.</li> </ul>	<p><b>2013</b></p> <p><b>Clients que trabajan con consultora de comunicación</b></p> <ul style="list-style-type: none"> <li>- Perfil de la muestra.</li> <li>- Tendencias de mercado.</li> <li>- Relación consultora-cliente.</li> <li>- Retos del sector para el futuro.</li> </ul> <p><b>Empresas que no trabajan con consultoras</b></p> <ul style="list-style-type: none"> <li>- Razones para no trabajar con consultoras.</li> </ul>
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Fuente: Elaboración propia.

Una vez analizadas las variables anteriores podemos distinguir claramente entre dos líneas de trabajo: por un lado, los estudios que abordan los departamentos de comunicación y el perfil profesional (DIRCOM 2000, 2005, 2010, 2015), entre el que incluiríamos varios apartados del estudio de la Fundación EOI<sup>5</sup> (2010), y por otro, los estudios que se centran en las consultoras de comunicación y su relación con el cliente (ADECEC 2002, 2004, 2008 y PrScope, 2013).

### **Metodología, método y muestras utilizadas**

Tanto los estudios publicados por ADECEC como los publicados por DIRCOM han sido mayoritariamente cuantitativos (DIRCOM, 2000, 2005, 2010, 2015; ADECEC, 2002, 2004, 2008; PrScope, 2013) y solo el encargado a la EOI en 2010 incluye metodología cualitativa (EOI, 2010). En este sentido, la encuesta y la entrevista estructurada han sido las técnicas más utilizadas.

Según indican los informes elaborados por DIRCOM, los tres últimos estudios (2005, 2010 y 2015) recurrieron a la técnica de la encuesta<sup>6</sup> representativa del universo. Sin embargo, tan solo se indica el margen de error en 2005 (+7%) y en 2010 (+5,26%). En todos los casos se ha contado con más de 200 participantes y el porcentaje del universo representado ha oscilado entre el 20,4% y el 26,7%.

En cuanto a las investigaciones realizadas por ADECEC (2002, 2004 y 2008) se utilizó en todos los casos la entrevista estructurada vía teléfono y asistida por ordenador. Los estudios han contado con dos poblaciones diferenciadas, las agencias y las empresas. El margen de error de los estudios de ADECEC (2004, 2008) está en torno al 7,27% y el 9,6%. En todas las ediciones de los informes se indica un nivel de confianza del 95,5%.

<sup>5</sup> El estudio elaborado por EOI (2010) se plantea a partir de la relevancia que han adquirido en los últimos años los recursos intangibles, como la reputación. Esta investigación pretende dibujar un marco que permita definir el “Modelo español de Gestión y *Reporting* de Intangibles para un Director de Comunicación”. Entre sus objetivos están: - Identificar qué intangibles debería gestionar un dircom, - ver cuáles realmente gestiona un DIRCOM, - averiguar el nivel de *reporting* existente sobre esos intangibles gestionados, - identificar perfiles profesionales dentro del mundo del dircom y sus necesidades formativas.

<sup>6</sup> El informe DIRCOM 2010 especifica que los cuestionarios se administraron vía online. En el resto de informes (2000, 2005 y 2015) no se detalla.

Únicamente el estudio encargado por la EOI (2010) varía su metodología. En este caso se lleva a cabo una investigación en dos fases: una primera cuantitativa, para la cual se utiliza una encuesta administrada vía online; y una segunda cualitativa, que consiste en grupos de discusión formados por 6 u 8 personas. Esta investigación presenta un error para el conjunto de la muestra de  $\pm 10,0\%$ .

En el último de los estudios referenciados en los que ambas asociaciones colaboran (PrSocope, 2013) se utiliza la técnica de la entrevista cuantitativa en el puesto del entrevistador y se recurre en algunos casos a la entrevista telefónica. El margen de error muestral en este caso es de 5,26%. Respecto a los sujetos que son objeto de estudio, todas las investigaciones (excepto la de EOI) escogen realizarlas a los responsables de comunicación de las empresas y profesionales de consultoras y agencias. En el caso de los estudios elaborados por ADECEC (2002, 2004, 2008) se trabaja de manera paralela y diferenciada con ambas poblaciones: empresas y agencias/consultoras.

Hay que señalar que solo en un caso, en el primer estudio realizado por DIRCOM en 2000, se ha testado también la opinión diferenciada de empresas y organismos públicos e instituciones. Por otra parte, el estudio de PrScope de 2013 es el que abarca más ámbitos de población, ya que incluye también a periodistas entre los entrevistados.

Todos los datos referentes a la metodología utilizada en cada uno de los casos, se refleja de manera resumida en la Tabla 2.

**Tabla 2. Universo y muestra de cada uno de los estudios.**

Asociación (Año)		Universo y muestra
a) Estudios propios		
DIRCOM (2000)	<b>Muestra:</b> N <sub>1</sub> =283 empresas (26% del universo) N <sub>2</sub> =189 organismos e instituciones (31,2% del universo)	
ADECEC (2002)	<b>Universo:</b> Población 1=empresas españolas que destinan parte de sus inversiones a comunicación y relaciones públicas Población 2=agencias del sector <b>Muestra:</b> N <sub>1</sub> =499 empresas seleccionadas en función del Ranking de Anunciantes 1999 de Infoadex. N <sub>2</sub> =168 agencias (32 pertenecen a ADECEC Y 136 no) La cobertura en función de los tipos de encuestados fue 100% en agencias pertenecientes a ADECEC, 33% en resto de agencias y 12,4% en empresas.	
ADECEC (2004)	<b>Universo:</b> Población 1=las 500 empresas españolas que destinan parte de sus inversiones a comunicación y relaciones públicas Población 2=agencias del sector. <b>Muestra:</b> N <sub>1</sub> =92 entrevistas con las empresas (con un error de ±9,6 para un nivel de confianza del 95,5%, y p/q= 50/50). N <sub>2</sub> =107 con agencias (33 pertenecen a ADECEC Y 74 no) (con un error de ±6,5% para un nivel de confianza del 95,5% y p/q= 50/50).	
DIRCOM (2005)	<b>Universo:</b> Población=1.000 grandes empresas españolas con una previsión de facturación anual superior a 6 millones de euros en 2004. <b>Muestra:</b> N=204 encuestas El margen de error obtenido fue de ± 7% y el nivel de significatividad se situó en el 95,5%.	
ADECEC (2008)	<b>Universo:</b> Población 1=516 mayores empresas con función de comunicación y Relaciones Públcas. Población 2=231 agencias (32 pertenecían a ADECEC <b>Muestra:</b> N <sub>1</sub> =102 profesionales (con un error de ±8,8% para un nivel de confianza del 95,5% y p/q=50/50) N <sub>2</sub> =105 entrevistas (con un error de ±7,27% para un nivel de confianza del 95,5% y p/q=50/50)	
DIRCOM (2010)	<b>Universo:</b> Población=993 empresas de mayor facturación de España. <b>Muestra:</b> N=265 empresas. Esta muestra representó un 26,7% del universo, con un error del ± 5,26%.	

DIRCOM (2015)	<p><b>Universo:</b> Población=507 empresas y 927 profesionales de comunicación.</p> <p><b>Muestra:</b> N= 213 empresas/profesionales de empresas. Esta muestra representó un 25% del universo.</p>
	b) Estudios externos
EOI (2010)	<p><b>Universo:</b> Población=450 asociados de la asociación de directivos de Comunicación “DIRCOM”.</p> <p><b>Muestra:</b> N=81 entrevistas (45 a dircom y 36 a Asesores de Comunicación/otros cargos) Esta muestra supuso una tasa de éxito de 18% y un error muestral para el conjunto de la muestra de ±10,0%.</p>
Grupo Consultores (2013)	<p><b>Universo:</b> Población=empresas, profesionales y periodistas del territorio español.</p> <p><b>Muestra:</b> N=374 (242 profesionales de empresas que trabajaban con consultoras/agencias de comunicación y RRPP, 54 profesionales de empresas que no trabajaban con consultoras, 53 profesionales de las consultoras/agencias de RR.PP. y 25 periodistas). La muestra representó un 26,7% del universo, con un error del ± 5,26%.</p>

Fuente: elaboración propia

### Principales resultados de los estudios

Si bien ya hemos comentado que no todos los ítems de los estudios pueden compararse desde la primera de las investigaciones realizadas, ni podemos considerar representativa la comparación entre estudios, los datos sí pueden servirnos para reflejar la evolución que ha sufrido la profesión en España desde 2000 hasta la actualidad.

A continuación se expondrán los principales resultados que los estudios reflejan respecto al estado de la profesión:

#### *Los departamentos de comunicación*

Cerca del 60% de las empresas consultadas cuentan con más de 250 empleados; el 16,02% con entre 50 y 250 empleados; y casi con igual porcentaje están las pequeñas empresas (aquellas que con 11-49 empleados). Por su parte, las microempresas (máximo 10 empleados) no representan ni siquiera el 10% (DIRCOM, 2015). Los datos coinciden con el informe de la EOI (2010) en el que se menciona que los dircom trabajan mayoritariamente en empresas grandes o muy grandes (66,7%), españolas (55,6%) y desarrollan su actividad en los sectores de automoción y transporte, banca, seguros y finanzas, tecnología y consultorías (DIRCOM, 2015; EOI, 2010). Tras constatar estas cifras, los expertos consultados (EOI, 2010) señalan que aunque las

PYMES están tomando conciencia de la importancia que tiene la figura del dircom en su estructura “todavía queda mucho por hacer”.

Respecto a la estructura del departamento, los estudios de DIRCOM mantienen la tendencia a centralizar las responsabilidades en una única persona, (65% en 2000, 58% en 2005, 69% en 2010 y 61,90% en 2015). Por otro lado, en 2015 se empiezan a recuperar los índices de empresas en las que, no habiendo un único responsable de la comunicación, sí hay una persona que se ocupa de la comunicación corporativa. De esta forma, mientras que así lo reflejaba el 29% de los encuestados en 2005, este porcentaje se reduce al 19% de las respuestas en 2010 y recupera posiciones hasta un 23,8% en el último estudio de 2015.

#### *Los términos que definen al profesional*

La denominación de los responsables de la comunicación corporativa sigue siendo conflictiva. En este sentido es llamativa la falta de unanimidad en su designación. Si en años anteriores se hacía referencia a aproximadamente 80 denominaciones diferentes (DIRCOM, 2005 y 2010), en 2015 la situación, en lugar de mejorar, se desborda con 119 apelativos para calificar una misma figura profesional (DIRCOM, 2015).

A pesar de la diversidad de términos empleados, la denominación más frecuente en los estudios de DIRCOM es la de “director de comunicación”, con un 26% de las respuestas, seguido de responsable de comunicación, con el 8%. Las designaciones que aparecen en todos los estudios, además de las ya citadas son “director de comunicación y relaciones institucionales”, “director de marketing y comunicación”, “jefe de prensa”, “director de comunicación corporativa”, “director de comunicación y responsabilidad empresarial” y “coordinador de comunicación”.

Los resultados del informe de la EOI (2010) refuerzan la disparidad de denominaciones que se utilizan para designar al dircom. Solo el 28,9% lo denomina “director de comunicación”; el 17,8% señala que su puesto es el de “director de marketing y comunicación”; y el 6,7% lo nombran como “director de comunicación y relaciones institucionales” y “director de comunicación e imagen corporativa”, respectivamente.

#### *Posición del profesional de comunicación en el organigrama empresarial*

La importancia que la comunicación adquiere en las empresas queda patente en los informes DIRCOM desde 2005 si analizamos la evolución del responsable de comunicación en el organigrama de la organización.

El 75% depende del primer nivel ejecutivo (DIRCOM, 2005, 2010 y 2015) evolucionando a ubicarse más de la mano del director general que de la presidencia.

Porcentajes muy similares se desprenden del estudio de la EOI (2010) en el que el 53,4% de los dircom dependen jerárquicamente de los dos primeros niveles de la empresa (el 26,7% del presidente y el mismo porcentaje del consejero delegado). El 33,3% depende directamente del director general.

Por otro lado, en los estudios DIRCOM vemos aumentar hasta un 11,8% el porcentaje de los responsables de comunicación que participan –siempre o en ocasiones– en el comité de dirección de la empresa, pasando de un 65% en el año 2005 a un 72,7% en 2015.

En este sentido, los expertos apuntan que la figura del dircom ha evolucionado en los últimos años y se ha hecho un “hueco” en la dirección de las compañías, especialmente en las de gran tamaño. Asimismo indican que suelen depender directamente de los niveles superiores de la empresa y es habitual que estén presentes en el comité de dirección (EOI, 2010).

#### *Perfil más habitual del director de comunicación*

En la actualidad los datos analizados muestran que no existe un perfil académico homogéneo de la figura del dircom (EOI, 2010), si bien el que se posiciona en primer lugar es el de licenciado en Periodismo (lo son casi la mitad de los analizados en 2015, frente al 29,4% de 2000, el 33,5% del 2005 y el 35,3% de 2010) (DIRCOM, 2015). También, y siguiendo la tendencia de los últimos años, aumentan los licenciados en Ciencias Económicas y Empresariales.

Asimismo, cabe destacar que la cualificación de los profesionales ha ido en aumento. Por un lado, se aprecia como del 8,4% de los que trabajaban en 2000 no tenían titulación universitaria. En la actualidad la práctica mayoría de ellos sí la tiene. Por otro lado, casi un 75% de los profesionales actuales cuentan con otra titulación adicional: máster, posgrado o doctorado.

Otro dato interesante que refleja el estudio de DIRCOM (2015) sobre el director de comunicación es que se trata de una persona de edad media de entre 40 y 49 años (44,2%). El 21,2% tiene de 35 a 39 años, el 16% tiene de 50 a 60 años, el 12,6% tiene de 31 a 34 años y los menores de 30 años y mayores de 60 son el 6,1 % de las personas encuestadas.

#### *Los departamentos internos de comunicación y la contratación de consultoras*

El último estudio publicado por ADECEC (2008) destaca que más del 80% de las empresas cuentan con un departamento de comunicación propio. Estos datos coinciden con los de DIRCOM (2010), que tan solo dos años más tarde reflejaba que nueve de cada diez grandes compañías disponen de un departamento de comunicación.

Por su parte, ADECEC analiza las disciplinas más empleadas y desarrolladas desde los departamentos de comunicación de las propias organizaciones en contraposición a las desempeñadas por consultoras subcontratadas.

En este sentido se aprecia un aumento de las relaciones institucionales y sobre todo de la reputación corporativa como las principales disciplinas que se desarrollan en los propios departamentos de las organizaciones. Por otra parte, queda reflejado un descenso de la comunicación medioambiental y de las relaciones con el gobierno.

Es importante destacar que los tres estudios de ADECEC (2002, 2004 y 2008) indican que en torno al 30% de las empresas trabajan habitualmente con una consultora y más de la mitad lo hace con más de una. Cabe destacar que en 2002 tan solo un 2% de las empresas afirmaba no subcontratar los servicios a consultoras de comunicación. Esta situación aumentó hasta el 25,6% en 2004 y descendió hasta el 15,1% en 2008. Estos datos, por tanto, revelan que entre un 75% de las empresas en 2004 y un 85% en 2008 recurrió a los servicios externos de consultoras. En 2013 se mantiene esta línea en la que el 71,1% de las empresas trabaja con una consultora, el 17,4% con dos y el 5,8 % con

tres (PrsCope, 2013). En conclusión, las empresas que no recurren a consultoras han descendido hasta un 5,7% en la actualidad.

Entre las disciplinas desarrolladas por las consultoras de comunicación contratadas por las empresas destaca el incremento en la investigación de mercados, la comunicación de marketing, la comunicación corporativa, la comunicación de crisis y el *frundraising*.

*Departamento sobre el que recae la decisión de contratación de las consultoras*

Al analizar los departamentos que contratan consultoras se puede apreciar cómo la relevancia que adquiere la comunicación hace que la contratación de consultoras recaiga en los altos cargos de la empresa (dirección general, presidencia y consejero delegado) (ADECEC, 2002). Sin embargo, también se puede dar otra lectura a este dato: se puede considerar que la tendencia a posicionar a los responsables de comunicación en la alta dirección hace que la decisión de contratación recaiga cada vez más en los departamentos de comunicación, relaciones públicas y marketing (ADECEC, 2004, 2008). Esa misma inercia queda reflejada en el estudio PrScope de 2013 (director de comunicación 51,2%, presidente/CEO, 30,2%; jefe de prensa 2,9%).

A la vista de los datos cabe concluir que los porcentajes y disciplinas de subcontratación, unidos a la frecuencia con la que contactan las empresas con las consultoras (diariamente el 34% en 2002, el 55,40% en 2004 y el 42,70% en 2008) y las valoraciones del grado de compromiso de las consultoras (más del 80% en todos los casos entre “alta” y “muy alta”), son un reflejo de que en muchas ocasiones la consultora se convierte en un *partner* clave en la comunicación de las organizaciones.

Por su parte, la mayoría de la muestra del estudio PrScope (2013) considera que las consultoras de comunicación con las que trabaja participa (de media) en un 48% en el cumplimiento de los objetivos estratégicos de la compañía. O lo que es lo mismo, estos mismos clientes valoran el trabajo de sus consultoras como socios estratégicos de comunicación.

*Principales objetivos de los planes de comunicación de las empresas*

La mejora de la reputación corporativa y el incremento del conocimiento de marca aparecen como objetivos de comunicación prioritarios para las empresas (ADECEC, 2002 y 2004), si bien en 2004 y 2008 el incremento de la fidelidad de los clientes adquiere relevancia frente al descenso del incremento de ventas que era un objetivo destacable en 2002.

El impacto logrado por los medios de comunicación sigue teniendo una posición importante entre los objetivos de las empresas, aunque hay un claro descenso en su relevancia entre 2000 y 2008.

Por su parte, el estudio elaborado por la EOI (2010) analiza en uno de sus apartados los principales objetivos de los dircom y, entre las respuestas sugeridas, las que suscitan más adhesión son “comunicar acerca de la empresa bajo el paraguas de la marca corporativa” (con una puntuación media de 6,60 sobre 7) y “crear legitimidad y confianza ante los grupos de interés clave” (6,26 sobre 7). Preguntados de forma espontánea por las principales funciones que la empresa ha fijado para su puesto como dircom, el resultado más recurrente es gestionar la “comunicación externa e interna” (citado por el 30,9%), seguido de “gestionar la imagen corporativa” (21,0%).

### *Futuro y tendencias del sector*

La percepción de los encuestados respecto a la evolución del papel que desempeña la comunicación en la empresa siempre ha sido muy optimista: en todos los años en los que se ha realizado el estudio DIRCOM (2000, 2005, 2010 y 2015) más del 80% considera que la tendencia será mayor o mucho mayor, mientras que los que estiman que ese rol será menor no superan el 3,90% en su último estudio.

Cuando en los diferentes estudios (ADECEC 2002, 2004 y 2008) se pregunta por el futuro de la comunicación y las relaciones públicas, se da una respuesta muy optimista respecto al sector. Así, vemos cómo los porcentajes disminuyen con los años, a la vez que se incrementan las opiniones que indican que el sector se mantendrá. Es cierto que el último estudio data de 2008, pero podría interpretarse como una tendencia hacia la estabilización del sector.

Asimismo, se profundiza en los factores que pueden propiciar una mayor incidencia en el aumento de las perspectivas. Frente a ítems como la saturación de los medios tradicionales o la relación coste/efectividad que aparecen de forma destacada en 2002, vemos como criterios intangibles como la imagen corporativa y la credibilidad aparecen con fuerza en 2004 y 2008. El peso de los intangibles empieza a verse reflejado ya en estos años como relevante para las empresas.

### **Discusión y conclusiones**

Las primeras investigaciones para conocer el estado de la profesión en España se realizan por parte de las principales agencias profesionales del sector, ADECEC y DIRCOM (Almansa, 2004; Estanyol y Laluez, 2014 y Gutiérrez, 2010).

Estas asociaciones han analizado con detalle y de forma periódica (DIRCOM) la situación de la propia profesión y del resto de agentes que participan en ella como son los profesionales, los departamentos de comunicación de las empresas y las agencias y consultoras de comunicación. Tal y como apuntaba Pavlik (1987, 1999) la investigación introspectiva que se refiere a cualquiera de los actores del proceso es fundamental para conocer la situación de la realidad de un sector e, indudablemente, los analizados en estos estudios lo son.

Además, la periodicidad y repetición de estos trabajos, como lleva haciendo DIRCOM desde el 1995 de manera quinquenal y ha realizado ADECEC en 2002, 2004 y 2008, son a priori un adecuado instrumento, no solo para evitar que los datos queden obsoletos (Pavlik, 1999) sino para aportar unos resultados que pueden compararse (DIRCOM, 2010 y 2015) y percibir la evolución.

Sin embargo, a raíz de la revisión llevada a cabo se han detectado importantes limitaciones: por un lado, la diferencia de variables de análisis planteadas en los distintos estudios (aspecto superado a partir de 2005 en DIRCOM y de 2004 en ADECEC), y por otro lado la falta de periodicidad, que únicamente se ha mantenido en el caso de los estudios desarrollados por DIRCOM.

Los hechos anteriormente mencionados llaman la atención si se tiene en cuenta que los trabajos realizados son rigurosos: partiendo de metodología científica se ha recurrido sistemáticamente a estudios empíricos cuantitativos para describir una realidad (en la mayoría de los casos empleando cuestionarios aplicados sobre muestras representativas de su universo). De este modo, el universo de las investigaciones ha sido plural y ha

incluido las principales áreas de la profesión: desde los departamentos de comunicación de empresas y organismos institucionales hasta las consultoras. Sin embargo, un sesgo importante para plasmar la realidad global es la limitación del universo según su facturación anual (más de 6 millones de euros de facturación, DIRCOM 2005 o las cerca de 1.000 empresas de mayor facturación, DIRCOM 2010, 2015) o según los presupuestos asignados a publicidad (según el *Ranking de anunciantes* Infoadex<sup>7</sup>, ADECEC 2002). Por ello, la utilización de estos criterios nos lleva a analizar tan solo una pequeña parte de las empresas en España donde más del 95% son pymes (INE, 2014).

En esta misma línea, los dircom consultados trabajan en empresas grandes o muy grandes (DIRCOM, 2015; EOI, 2010) y, por lo tanto, los datos reflejados atienden a un profesional que desarrolla su trabajo en un segmento que representa actualmente el 0,161 % frente al 99,8 % de las empresas españolas que tienen menos de 200 empleados (INE, 2014). En la fase cualitativa del estudio de la Fundación EOI (EOI, 2010) los expertos señalan que aunque las pymes están tomando conciencia de la importancia que posee la figura del dircom en su estructura “todavía queda mucho por hacer”. Estos datos o esta realidad de la comunicación en las pymes españolas (el 99,8 % de las empresas españolas lo son) no se recogen de forma representativa en ninguno de los estudios analizados.

Mientras que el perfil del profesional del ámbito de la comunicación corporativa, en su sentido más general (departamento, perfiles, disciplinas...), se ha analizado con una periodicidad fija quinquenal (DIRCOM), los aspectos centrados en la relación empresa-consultoras estudiados por ADECEC han sido más discontinuos en el tiempo y dejaron de publicarse en 2008.

Sin embargo, aunque no podamos comparar todos los ítems, el universo no cumpla siempre los mismos requisitos y no podamos considerar representativa la comparación entre estudios elaborados por las diferentes asociaciones, los datos que se extraen de los mismos pueden servir como una orientación para tratar de reflejar la evolución que ha sufrido la profesión en España, sobre todo desde el año 2000. De este modo, la percepción de los encuestados respecto a la evolución del papel que desempeña la comunicación en la empresa siempre ha sido muy optimista (DIRCOM, 2000, 2005, 2010 y 2015; ADECEC 2002, 2004 y 2008). Acorde a esta idea, vemos un aumento de departamentos de comunicación en las empresas en los que cada vez aparece un responsable de la comunicación corporativa y en los que estos responsables van adquiriendo un posicionamiento en el organigrama junto a la alta dirección.

Se describe un profesional cada vez más estratégico, hecho que también se refleja en la mayor relevancia de los planes de comunicación y en la subcontratación de consultoras como *partners*.

Si bien la relación con los medios sigue ocupando los principales puestos en las características más valoradas por los profesionales, vemos como criterios intangibles (la reputación, la imagen corporativa y la credibilidad) aparecen con fuerza (DIRCOM, 2010 y 2015; ADECEC, 2004 y 2008; EOI, 2010). El peso de los intangibles empieza a reflejarse ya en estos años como relevante para las empresas.

<sup>7</sup> InfoAdex efectúa el control y el análisis de la actividad publicitaria en España. Este criterio a la hora de definir el universo excluye a todas las empresas que no hacen grandes inversiones, sobre todo en los medios de comunicación.

Los datos muestran que no existe un perfil homogéneo de la figura del dircom si bien se posiciona en primer lugar el licenciado en Periodismo y suben los licenciados en Ciencias Económicas y Empresariales. Asimismo, aumenta la cualificación de los profesionales.

Es relevante la falta de unanimidad en la denominación de los responsables de la comunicación corporativa. Cada vez se recogen más apelativos diferentes para hacer referencia a un mismo puesto (hasta 119 en DIRCOM, 2015).

Otro dato interesante es que ninguno de los estudios analiza con detalle la situación del perfil profesional. En este sentido, vemos cómo quedan por estudiar aspectos relevantes del perfil y el ámbito laboral de los profesionales de la comunicación corporativa como son: la estructura del mercado laboral, las condiciones laborales, las expectativas y obstáculos que encuentran los profesionales en la práctica habitual de su profesión, etc. Estos aspectos serán considerados por futuras investigaciones de la doctoranda con la finalidad de describir la situación laboral actual de estos profesionales en España.

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