

Technology and Social Media

Foresight – issue 152

VisitBritain Research



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1. Introduction

- This edition of Foresight explores how international travellers use social media and technology when they travel.
- This analysis comes from a research study carried out by VisitBritain and research agency Ipsos in spring 2016. International travellers from 20 different markets were interviewed, and are either previous visitors to Britain, or would consider visiting in the future.
- The study took place online, amongst international travellers, residents of the following markets: Australia, Brazil, Canada, China, Denmark, France, Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, Saudi Arabia, South Korea, Spain, Sweden, UAE & USA.
- There are two other Foresight reports from this project, one on Researching and Planning (issue 150) and another on Booking a holiday (issue 151).

2. Summary (1/2)

- **Facebook and YouTube are the most often used social media networks in European and English speaking long haul markets. There are some differences in social media usage in other long-haul markets:**
 - In Russia Vkontakte is more often used than Facebook or YouTube.
 - In China, local social networks dominate, with little usage of global networks.
 - In South Korea, Kakao is the most often used, followed by YouTube and Facebook.
- **The most popular use for social media is to access news (53%), followed by uploading photos or videos (47%):**
 - Social media usage varies by age, those aged 18-44 are generally more active than those aged 45+.
- **Smartphones are owned by 87% of international travellers, with ownership highest in South Korea (94%), Spain (94%) India (93%), China (92%).**
 - Lowest smartphone ownership in Japan (66%).
 - Digital cameras are owned by 74%, tablets by 63%, and selfie sticks by 23%.
- **Over two thirds (69%) agree that they like to stay connected when on holiday.**
 - Three quarters agree that their smartphone is essential when they travel, and 56% say the same for their tablets.
- **The majority (61%) have shared photos of a holiday online, and 42% have done the same for video.**
 - Around a fifth have not shared photos or videos, but would be interested in doing so.
 - Sharing content is highest in Brazil, Russia, India, New Zealand and USA, whilst lowest is in Japan.
- **Over half have used location technology to find nearby places to visit, and a further quarter would like to try this.**

2. Summary (2/2)

- **Whilst on holiday, social media is most often used to keep in touch with home, followed by posting or uploading photos.**
 - Just under a third have used social media to look for recommendations on where to eat or drink.
 - Holiday social media usage is lowest in Denmark, France, Germany and Japan.
- **Reviews on social media are appreciated, as over half say that they trust reviews from other tourists.**
 - Writing reviews divides opinion, as while 42% enjoy writing reviews, a third do not.
 - Women are slightly more likely to trust reviews, as are those aged 18-34 years old.
- **Over half have used their smartphone to access reviews on attractions (56%) or places to eat or drink (54%).**
 - Women are slightly more likely than men to use their smartphone to access reviews, as are those aged 18-34 years old.
- **Whilst many are happy to use their smartphones abroad, an overwhelming proportion (83%) still wish that it was cheaper.**
 - The highest levels of concern about the of using smartphones abroad comes from Spain, Russia, France and Sweden.
 - Travellers from South Korea, UAE, Denmark, Netherlands and Germany are less concerned.

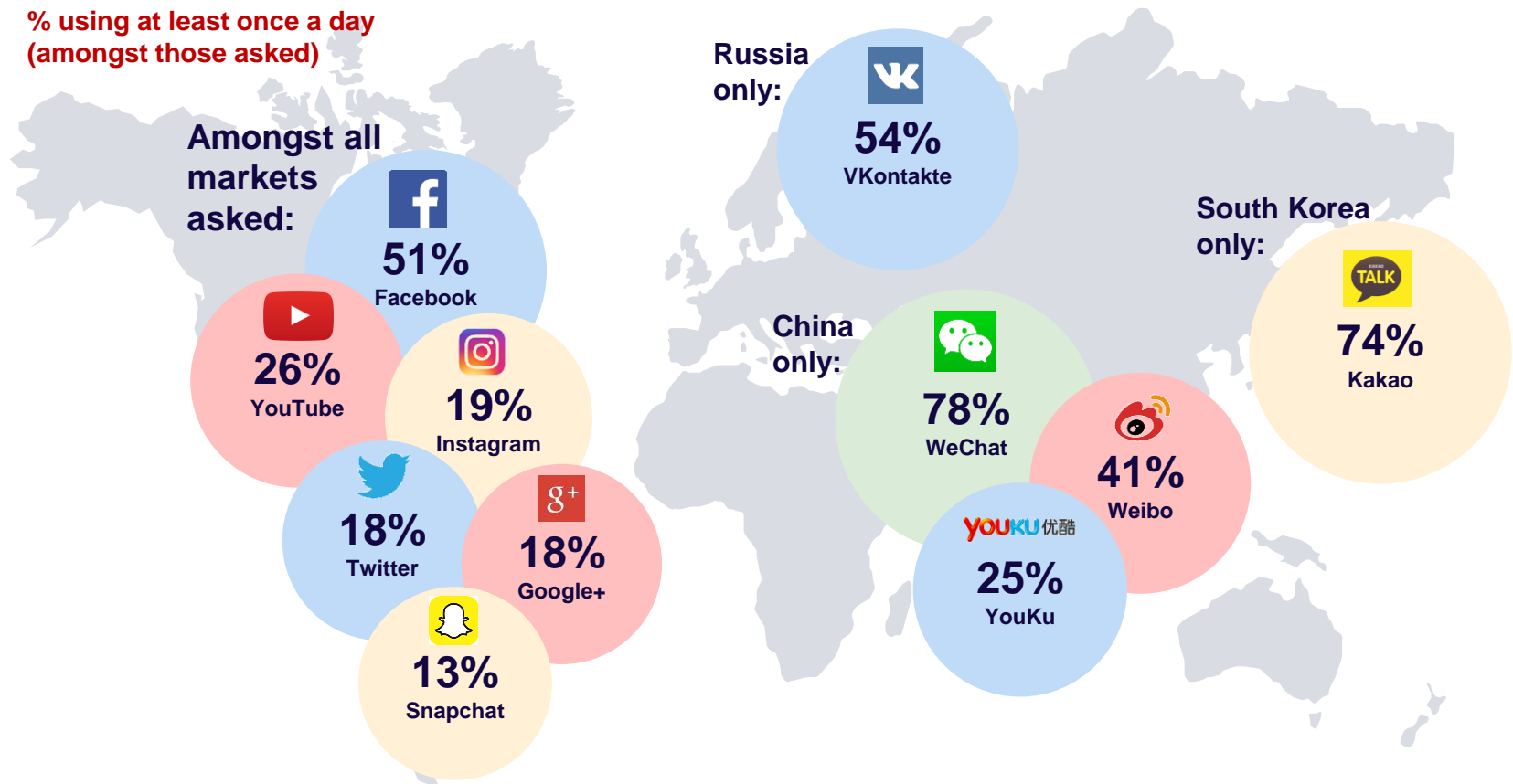


General social media and technology use

Social media usage

Facebook and YouTube are the most used social media platforms across European and English-speaking long-haul markets. Local networks are more widely used in China, South Korea and Russia. See the following slides for the top social media networks by market.

**% using at least once a day
(amongst those asked)**



QS1: How often do you use the following social media platforms?

Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

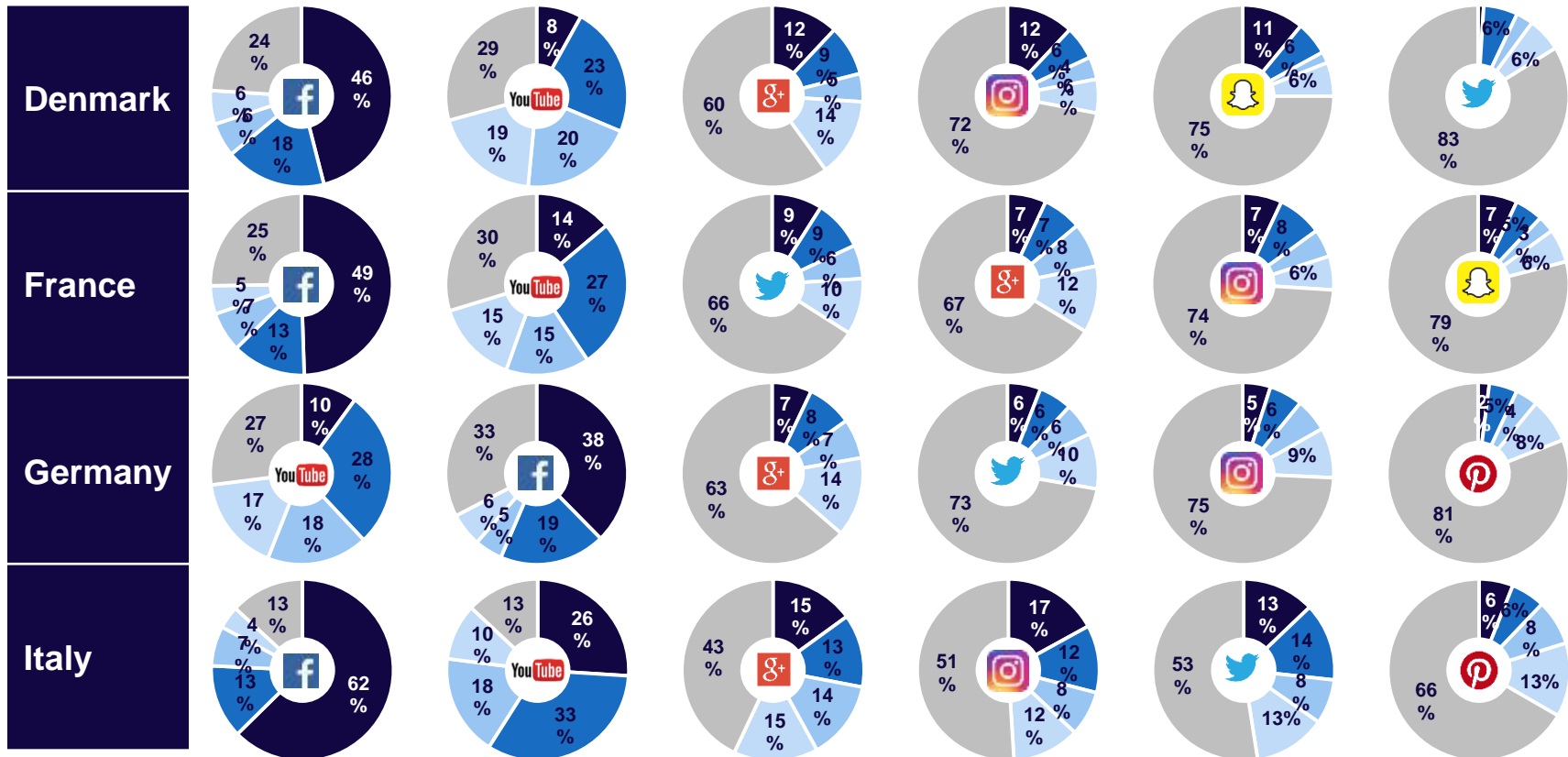


Social media used

Short-haul markets (1/2)

Top 6 per market, ranked by total usage

Facebook has the most daily users, although YouTube has a higher proportion of users overall in Germany. Other top social platforms used are Google+, Instagram, Snapchat, Twitter and Pinterest.



QS1: How often do you use the following social media platforms?
 Base: Denmark (500), France (600), Germany (554), Italy (600)

At least once a day
 At least once a week
 At least once a month
 Less often
 Never

Nb. Different social media networks asked per market

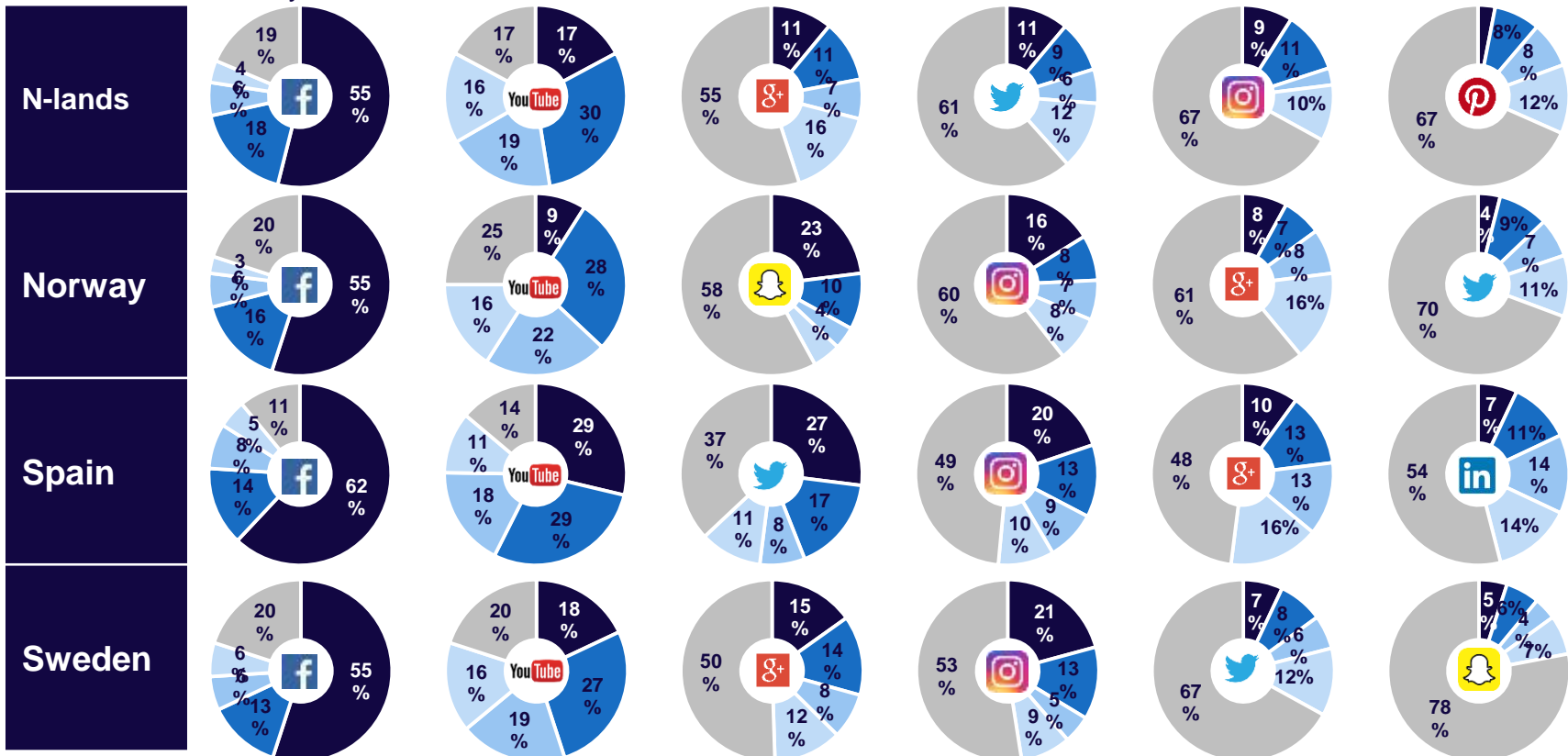


Social media used

Short-haul markets (2/2)

Top 6 per market, ranked by total usage

Daily Facebook usage is high, with over half in the below markets accessing the network at least once a day. Social media usage is high overall in Spain, with many accessing different networks several times a day.



QS1: How often do you use the following social media platforms?
 Base: Netherlands (500), Norway (500), Spain (600), Sweden (500)

At least once a day
 At least once a week
 At least once a month
 Less often
 Never

Nb. Different social media networks asked per market

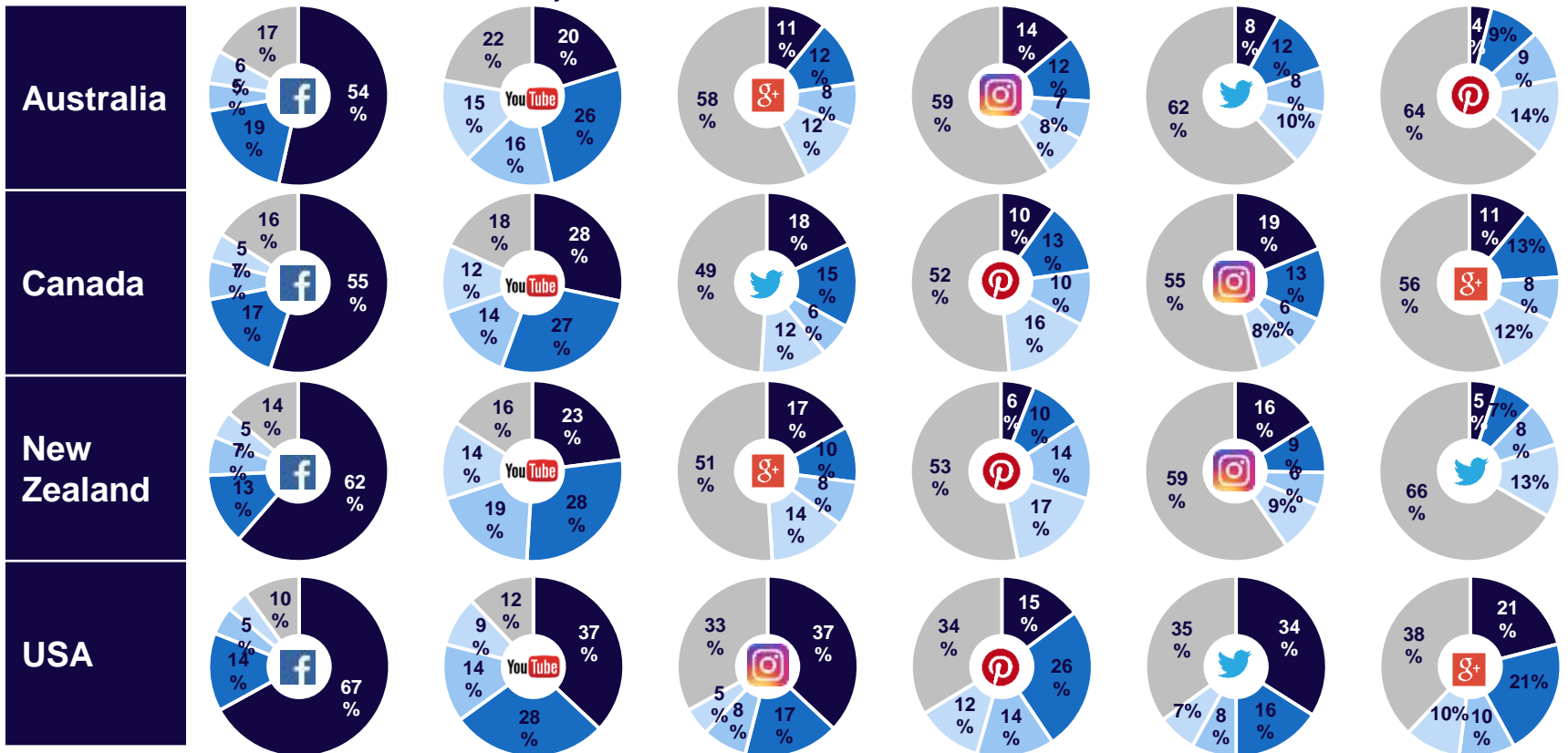


Social media used

Long-haul markets (1/3)

Top 6 per market, ranked by total usage

Facebook dominates in terms of daily usage, highest in the USA. YouTube also has high usage overall, although less frequent than Facebook. Social media usage is highest in the USA; over a third are using Facebook, YouTube, Pinterest and Twitter at least once a day.



QS1: How often do you use the following social media platforms?
 Base: Australia (600), Canada (600), New Zealand (600), USA (600)

At least once a day
 At least once a week
 At least once a month
 Less often
 Never

Nb. Different social media networks asked per market

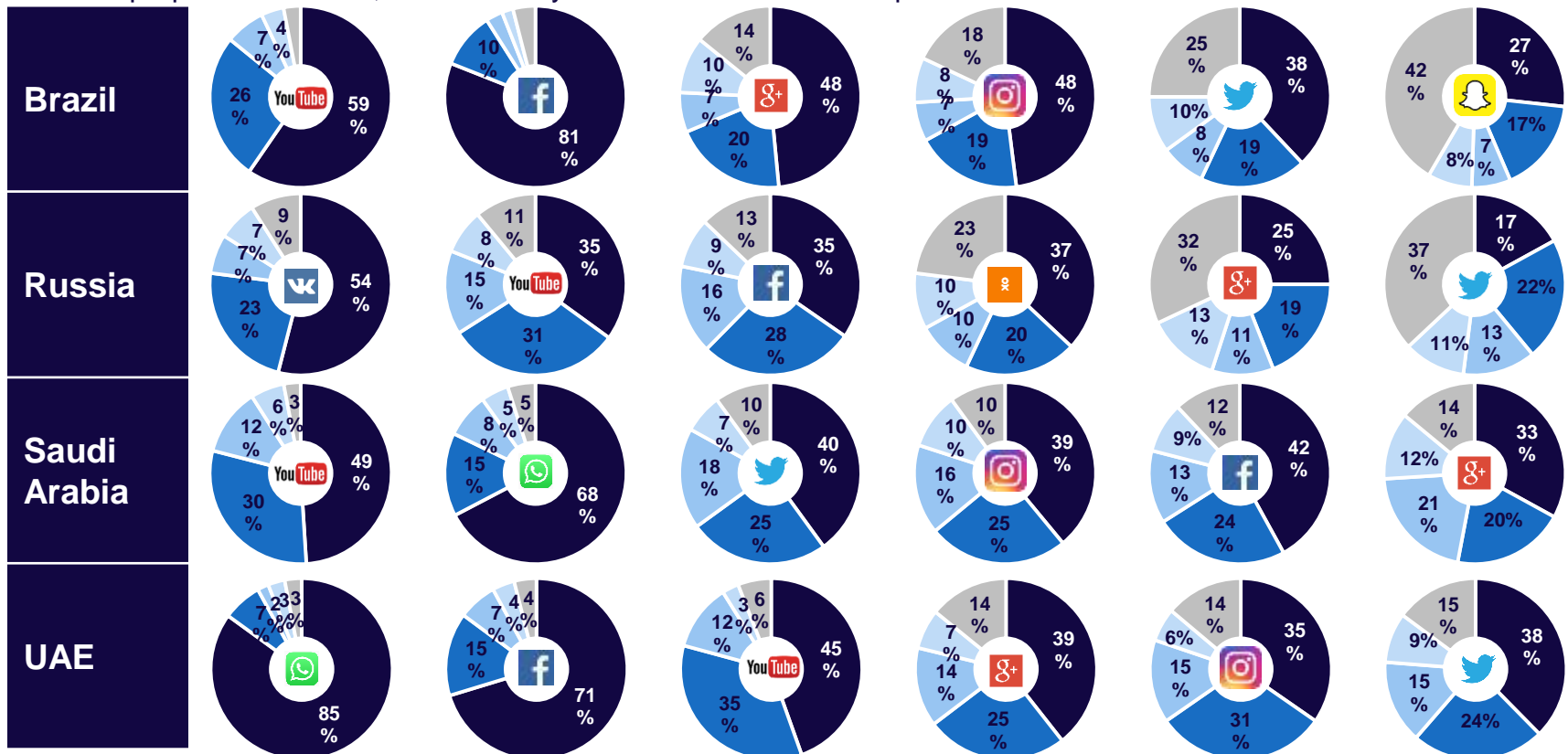
Social media used

Long-haul markets (2/3)



Top 6 per market, ranked by total usage

Facebook and YouTube are used widely throughout all markets. Russia's primary social network is Vkontakte, which is used daily by over half. Instagram is used daily in by many in Brazil, Saudi Arabia and UAE, and Twitter has a lower proportion of users, and less daily users in all markets except Saudi Arabia.



QS1: How often do you use the following social media platforms?
 Base: Brazil (600), Russia (600), Saudi Arabia (347), UAE (253)

At least once a day
 At least once a week
 At least once a month
 Less often
 Never

Nb. Different social media networks asked per market

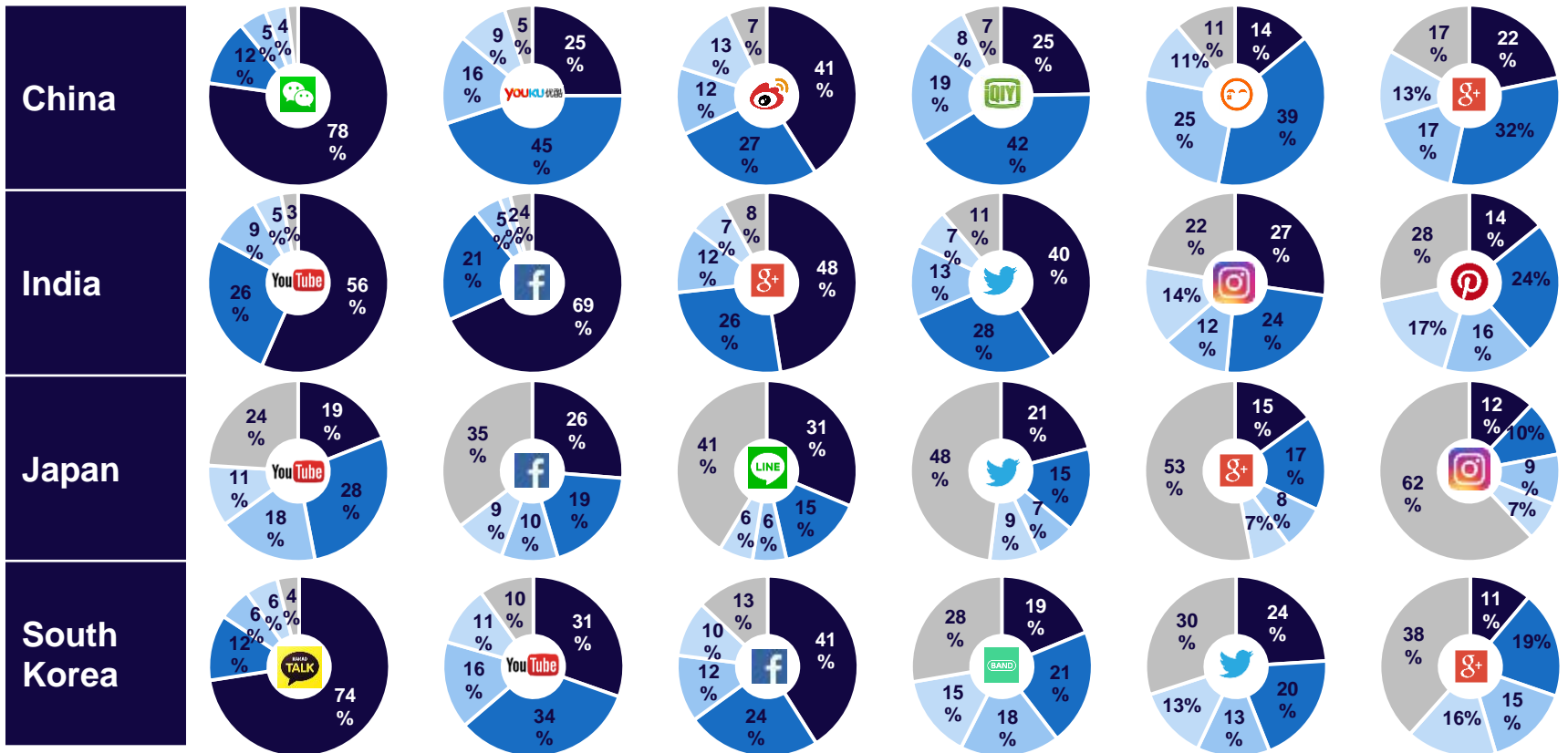
Social media used

Long-haul markets (3/3)



Top 6 per market, ranked by total usage

YouTube and Facebook have the highest usage in India and Japan – India in particular has high daily usage of multiple networks. Three quarters in China are using WeChat at least once a day, and Kakao dominates in South Korea.



QS1: How often do you use the following social media platforms?
 Base: China (600), India (600), Japan (600), South Korea (600)

At least once a day
 At least once a week
 At least once a month
 Less often
 Never

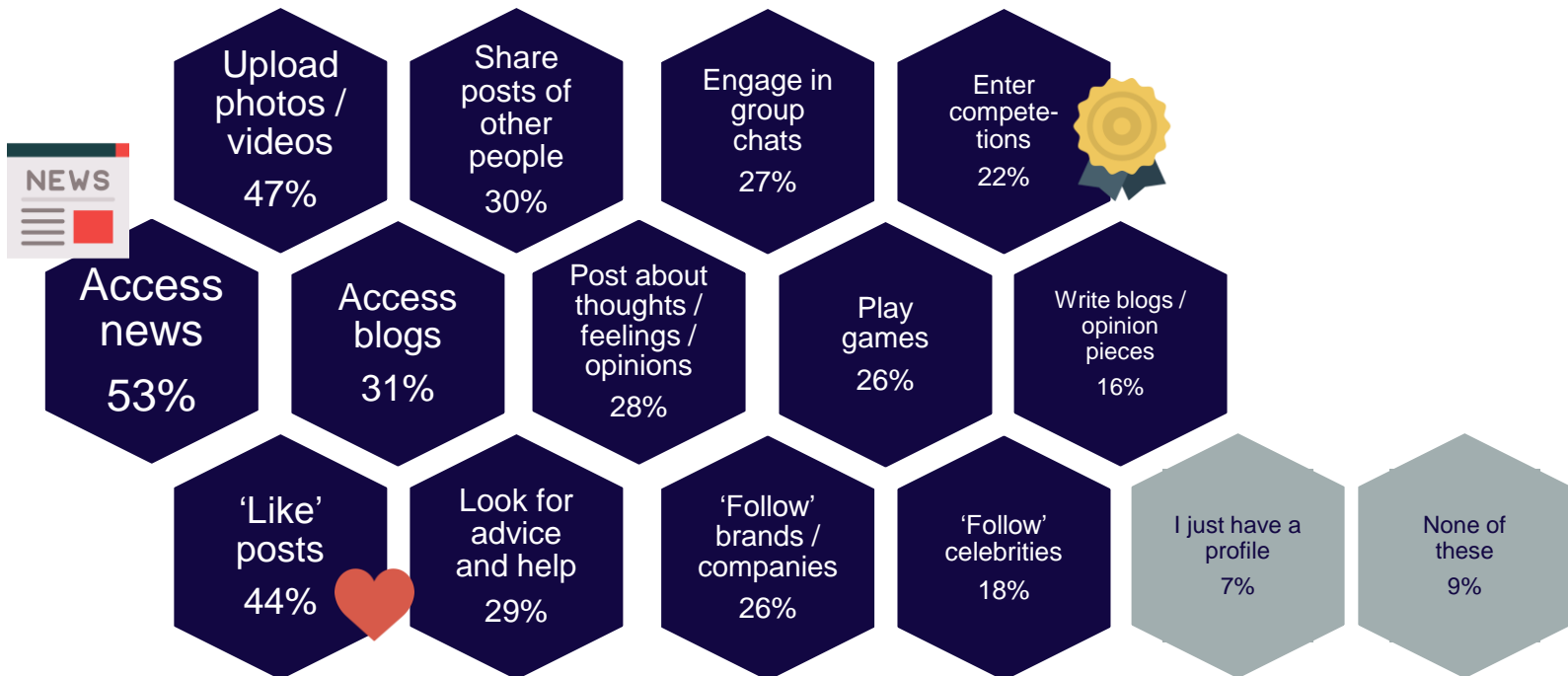
Nb. Different social media networks asked per market

Using social media

Accessing news is the most common use for social media, and over half (53%) are using it for this purpose.

Just under half (47%) are uploading photos or videos to social media, and 44% are 'liking' other people's posts. 31% are accessing blogs, and 30% are sharing posts from other people or companies that they follow.

A small proportion (7%) don't actively use social media and just have a profile.



QS4: Which of the following do you do when using social media?

Base: All Respondents (11,400)

Using social media

By age and gender

Women are generally more likely than men to use social media in the ways listed below, with the exception of writing blog or opinion pieces. For those aged 18-34, the top social media activity is uploading photos or videos, liking posts and then accessing news – which is top for those aged 35+. In general, those aged 18-34 are most active on social media, taking part in a range of activities. Almost one in five of those aged 55+ just have a profile, and do not partake in any social media activities.

SOCIAL MEDIA USAGE INDEX	TOTAL	Male	Female	18-34 years	35-54 years	55+ years
Access news	70	64	77	81	73	50
Upload photos / videos	53%	49%	56%	50%	54%	53%
'Like' or 'favourite' posts by other people or organisations	47%	42%	52%	53%	49%	34%
Access blogs / opinion pieces	44%	39%	50%	50%	45%	33%
Share / broadcast posts of others e.g. re-post, re-tweet or re-pin, re-gram	31%	28%	33%	35%	31%	24%
Look for advice and help	30%	27%	33%	34%	32%	20%
Write posts about your thoughts / feelings / opinions	29%	26%	32%	31%	31%	25%
Engage in group conversations or 'chats'	28%	26%	29%	32%	30%	17%
Register interest in or attendance of events	27%	25%	29%	35%	28%	14%
Subscribe to or 'follow' brands / companies	27%	23%	30%	32%	27%	17%
Play games	26%	23%	29%	33%	28%	13%
Enter competitions	26%	23%	28%	29%	27%	19%
Subscribe to or 'follow' celebrities	22%	19%	25%	26%	22%	14%
Write blogs / opinion pieces	18%	16%	20%	27%	17%	6%
None of these	16%	18%	15%	21%	16%	10%
I just have a profile	9%	10%	8%	4%	9%	17%
	7%	7%	6%	5%	6%	9%

QS4: Which of the following do you do when using social media?

Base: All Respondents (11,400), Male (5,821), Female (5,579), 18-34 (4,258), 35-54 (4,287), 55+ (2,854)

Using social media

Market breakdown

SOCIAL MEDIA USAGE INDEX	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
	70	57	96	63	89	60	59	46	100	76	37	50	80	66	97	66	63	80	63	79	78
Access news	53%	37%	65%	45%	62%	58%	52%	51%	50%	58%	36%	50%	52%	62%	72%	41%	36%	61%	63%	36%	47%
Upload photos / videos	47%	46%	64%	47%	56%	38%	39%	28%	63%	54%	24%	39%	61%	41%	63%	43%	36%	50%	40%	43%	55%
'Like' or 'favourite' posts by other people or organisations	44%	43%	61%	44%	39%	47%	32%	29%	59%	48%	19%	34%	53%	53%	56%	31%	35%	56%	46%	39%	47%
Access blogs / opinion pieces	31%	21%	46%	22%	46%	26%	30%	21%	41%	33%	18%	15%	27%	26%	49%	27%	28%	45%	31%	30%	30%
Share / broadcast posts of others e.g. re-post, re-tweet or re-pin, re-gram	30%	16%	46%	25%	51%	21%	26%	18%	42%	32%	16%	27%	27%	29%	41%	25%	27%	44%	22%	42%	30%
Look for advice and help	29%	25%	26%	26%	37%	24%	27%	23%	44%	37%	11%	17%	35%	35%	44%	29%	24%	27%	29%	30%	33%
Write posts about your thoughts / feelings / opinions	28%	25%	42%	26%	36%	11%	30%	11%	52%	32%	22%	11%	26%	16%	36%	27%	33%	32%	19%	38%	35%
Engage in group conversations or 'chats'	27%	24%	37%	23%	43%	23%	13%	16%	45%	31%	13%	16%	33%	24%	37%	31%	26%	28%	20%	32%	27%
Register interest in or attendance of events	27%	23%	43%	20%	27%	27%	29%	21%	34%	34%	8%	22%	36%	31%	27%	21%	22%	22%	28%	30%	28%
Subscribe to or 'follow' brands / companies	26%	19%	36%	23%	33%	21%	17%	14%	34%	32%	13%	20%	30%	24%	38%	26%	25%	29%	21%	33%	32%
Play games	26%	20%	40%	27%	31%	16%	23%	19%	38%	18%	11%	27%	29%	18%	40%	31%	18%	24%	22%	30%	36%
Enter competitions	22%	24%	16%	24%	14%	25%	19%	8%	30%	10%	4%	10%	48%	26%	35%	26%	15%	31%	21%	32%	23%
Subscribe to or 'follow' celebrities	18%	14%	27%	14%	28%	15%	9%	10%	33%	14%	13%	10%	16%	7%	27%	21%	27%	16%	14%	30%	24%
Write blogs / opinion pieces	16%	9%	28%	12%	31%	8%	9%	8%	37%	22%	16%	6%	9%	5%	19%	19%	25%	16%	6%	28%	23%
None of these	9%	14%	2%	12%	2%	12%	12%	21%	1%	6%	29%	9%	8%	10%	2%	5%	6%	6%	9%	2%	8%
I just have a profile	7%	10%	3%	6%	0%	11%	9%	12%	2%	7%	5%	17%	8%	8%	3%	2%	3%	5%	8%	5%	5%

QS4: Which of the following do you do when using social media?

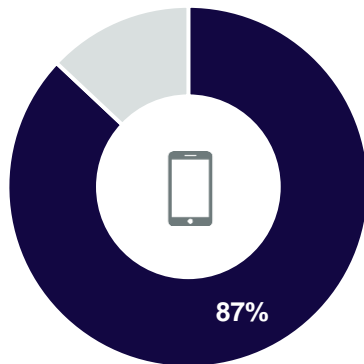
Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Technology ownership

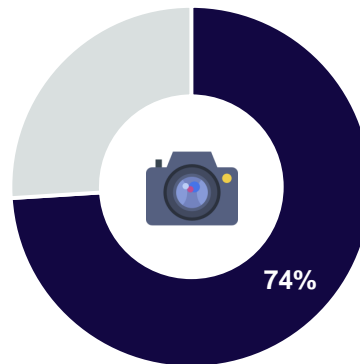
Smartphone penetration is high among international travellers, with 87% owning one. Three quarters are owners of a digital camera, and then just under two thirds own a tablet computer.

Video cameras are owned by just over a quarter of international travellers, and selfie sticks by 23%. Wearable technology such as smartwatches are owned by 16%.

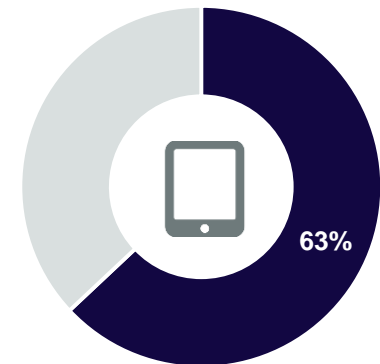
Smartphone



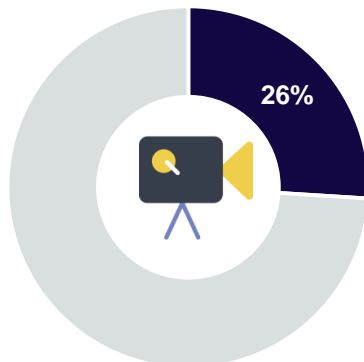
Digital camera



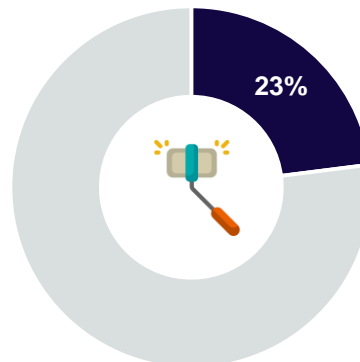
Tablet computer



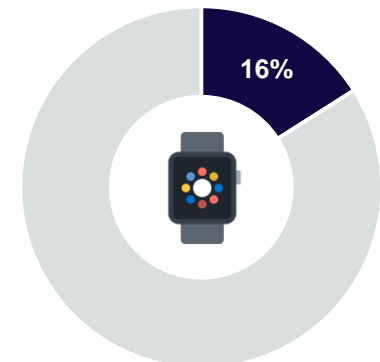
Video camera



Selfie stick



Wearables









Technology ownership

By age and gender

There are some minor differences in tech ownership among men and women, with men more slightly more likely to own a tablet computer, video camera and smartwatch.

However, the differences in ownership for different age groups is more striking. Smartphone penetration is highest for the youngest age group (91% of 18-34 year olds), whilst digital camera ownership is highest amongst those aged 55+.

Tablets are most likely to be owned by those aged 35-54 and selfie stick and smartwatch ownership is highest amongst those aged 18-34.

% own		TOTAL	Male	Female	18-34 years	35-54 years	55+ years
Smartphone		87%	86%	88%	91%	89%	76%
Digital camera		74%	74%	75%	67%	77%	81%
Tablet computer		63%	64%	61%	60%	68%	58%
Video camera		26%	28%	23%	28%	27%	20%
Selfie stick		23%	23%	23%	30%	23%	11%
Smartwatch		16%	18%	14%	21%	17%	6%

QM1: Which of the following do you own?

Base: All Respondents (11,400), Male (5,821), Female (5,579), 18-34 (4,258), 35-54 (4,287), 55+ (2,854)

Technology ownership

By market

Smartphone penetration is high across most markets, with the exception of Japan, where just 66% of international travellers are smartphone owners.

There is high tech ownership among certain markets in particular: Brazil, China, India, South Korea and Spain.

Selfie sticks divide opinion: there are strong ownership levels in Brazil, India, South Korea, China and UAE; however, few are owners amongst European markets.

% own	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Smartphone	87%	84%	91%	80%	92%	84%	83%	86%	93%	91%	66%	86%	85%	90%	92%	81%	94%	94%	87%	84%	86%
Digital camera	74%	71%	79%	73%	81%	68%	84%	78%	75%	79%	77%	76%	77%	71%	80%	44%	75%	80%	70%	58%	67%
Tablet computer	63%	61%	72%	60%	75%	61%	59%	55%	68%	62%	36%	65%	60%	65%	78%	61%	51%	71%	67%	55%	68%
Video camera	26%	19%	48%	18%	41%	13%	24%	20%	39%	29%	18%	18%	20%	14%	33%	33%	20%	27%	16%	42%	34%
Selfie stick	23%	13%	43%	15%	57%	5%	10%	10%	43%	19%	10%	13%	16%	9%	17%	28%	53%	29%	10%	58%	27%
Smartwatch	16%	12%	21%	12%	40%	5%	7%	8%	29%	11%	11%	9%	9%	9%	18%	24%	20%	13%	9%	36%	26%

QM1: Which of the following do you own?

Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)



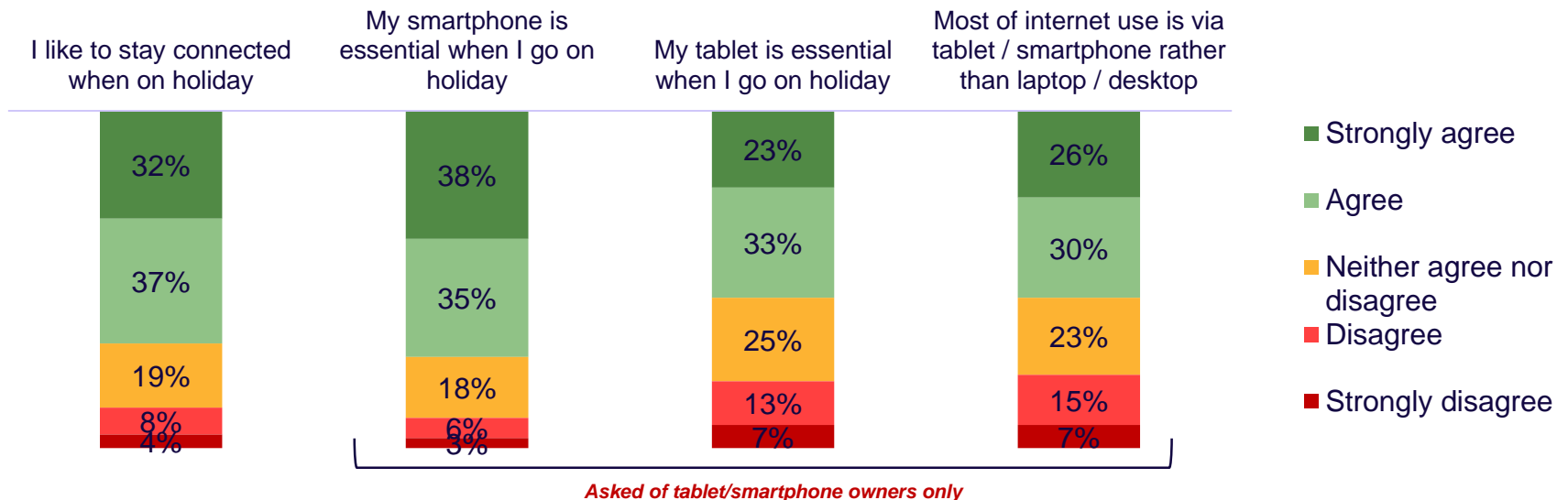
Technology use on holiday

Staying connected when on holiday

Technology is key for so many when they travel and 69% agree that they like to stay connected when on holiday. Smartphones win out ahead of tablets with 73% in agreement that their smartphone is essential when on holiday. Over half (56%) still say that their tablet is essential for their travels.

Over half (56%) also claim that now most of their internet use is via mobile devices, rather than a more traditional laptop or desktop computer.

Attitudes towards staying connected when on holiday



Staying connected when on holiday

By age and gender

There is little difference between men and women when it comes to staying connected when on holiday, however women are more likely to be using the internet via mobile devices rather than laptop or desktops.

There is a greater divide when it comes to age; those aged under 34 years are more likely to agree that they like to stay connected (73%) and that their smartphone is an essential holiday item (77%) than those aged over 55 years.

% Strongly agree & agree	Total	Male	Female	18-34 years old	35-54 years old	55+ years old
I like to stay connected when on holiday	69%	68%	70%	73%	70%	61%
My smartphone is essential when I go on holiday	73%	72%	74%	77%	75%	63%
My tablet is essential when I go on holiday	56%	56%	56%	57%	56%	53%
Most of internet use is via tablet / smartphone rather than laptop / desktop	56%	54%	59%	65%	57%	41%

Source: QM3. To what extent do you agree with the following statements?

Base: All Respondents (11,400), Male (5,821), Female (5,579), 18-34 (4,020), 35-54 (4,016), 55+ (2,437)

Staying connected when on holiday

By market

Some markets are more 'connected' than others when they go on holiday, with the highest levels from India, Russia, Brazil, China, USA, New Zealand and Saudi Arabia. All these markets, with the exception of New Zealand, have higher than average usage of smartphones and tablets when on holiday.

The lowest levels of smartphone and tablet usage on holiday comes from the Netherlands.

% Strongly agree & agree	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
I like to stay connected when on holiday	69%	71%	82%	67%	82%	50%	67%	55%	88%	72%	60%	62%	77%	61%	85%	75%	53%	72%	60%	64%	77%
My smartphone is essential when I go on holiday	73%	73%	90%	67%	88%	51%	64%	63%	90%	79%	68%	44%	75%	69%	82%	81%	76%	75%	67%	70%	81%
My tablet is essential when I go on holiday	56%	62%	72%	57%	65%	30%	45%	46%	83%	57%	67%	25%	57%	44%	67%	70%	62%	40%	42%	68%	69%
Most of internet use is via tablet / smartphone rather than laptop / desktop	56%	52%	76%	46%	72%	47%	38%	29%	75%	52%	47%	48%	53%	55%	78%	78%	56%	53%	46%	67%	64%

Source: QM3. To what extent do you agree with the following statements?

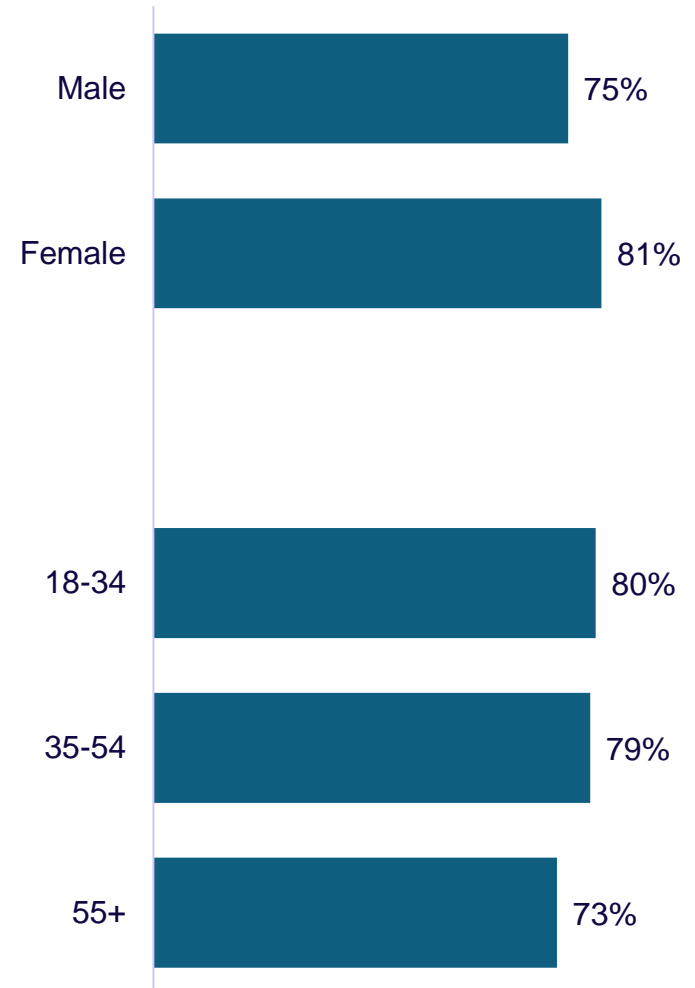
Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Taking photos on holiday

Total and by age and gender

Women are more likely than men to enjoy taking photos on holiday.

Those aged 18-34 are most likely to enjoy taking holiday photos, followed closely by those aged 35-54, where 4 out of 5 enjoy this activity. Whilst those aged over 55 are slightly less likely, three quarters still enjoy taking holiday pictures.

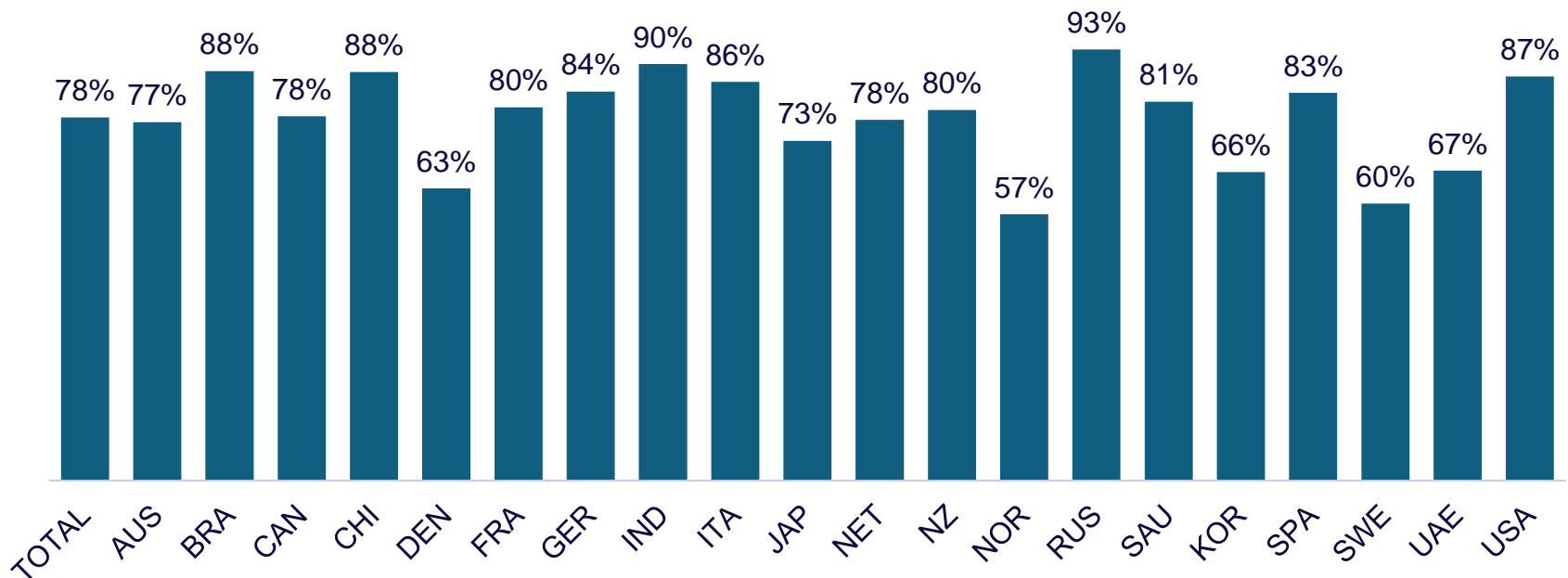


Taking photos on holiday

By market

Russians are the most enthusiastic about taking photos on holiday, as 93% of Russian travellers say that they enjoy this. There are also high proportions from India (90%), Brazil (88%) and China (88%) and USA (87%) who enjoy taking photos.

Travellers from Nordic countries, South Korea and UAE have lower levels of interest in taking photos on holiday, although still over half in all these markets say they do enjoy it.



Source: QR8. I love taking photos on holiday / vacation

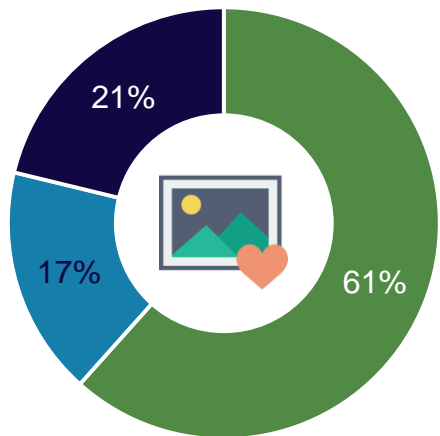
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Sharing holiday photos and videos online

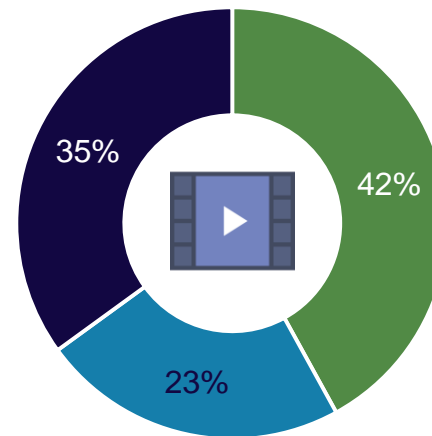
Sharing photos of a holiday online is very common behaviour, with 61% saying that they have already done this during their trip. A further 17% would be interested in doing this, and just one in five have no interest.

Video sharing has lower adoption, with just 42% having done this on holiday, although a further 23% would be interested in doing this. Just over a third (35%) say they have no interest in doing this.

Taken photos on holiday and shared them online



Taken videos on holiday and shared them online



Have done on holiday

Not done, but interested



Not done and not interested

Sharing holiday photos and videos online

By age and gender

Women are slightly more likely than men to share their holiday photos when they're abroad, however sharing videos is balanced evenly between men and women. Whilst men are less likely to have already shared their photos, they have a higher potential interest in doing so in the future.

When it comes to age, those aged under 34 years are both more likely to have shared a holiday photo (69%) and shared a holiday video (53%), when abroad. This age group also has a high potential for doing this in the future.

		Total	Male	Female	18-34 years old	35-54 years old	55+ years old
Sharing holiday photos whilst abroad 	Have done	61%	57%	64%	69%	62%	45%
	Would be interested in	17%	19%	15%	19%	17%	14%
Sharing holiday videos whilst abroad 	Have done	42%	42%	42%	53%	43%	24%
	Would be interested in	23%	24%	22%	26%	24%	18%

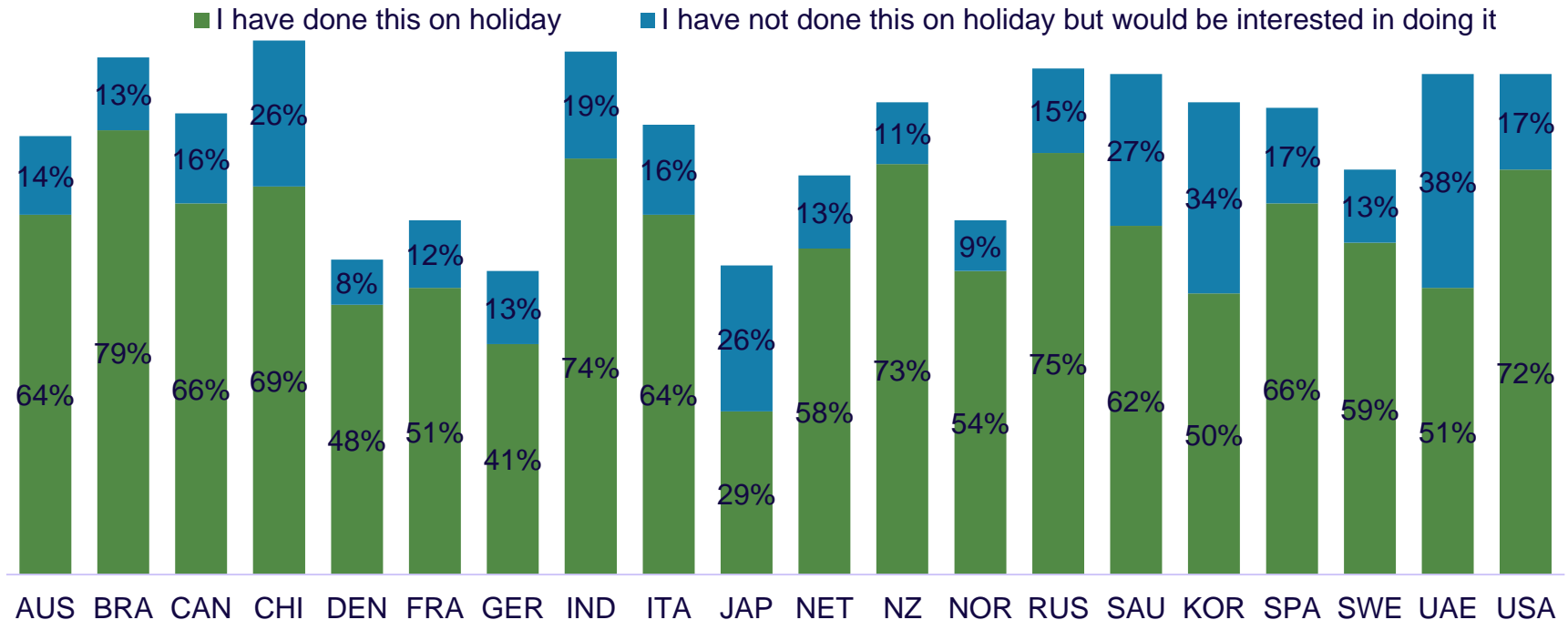
Sharing holiday photos online

By market



There is a high proportion of holiday photo sharing from Brazil (79%), Russia (75%), India (74%), New Zealand (73%) and USA (72%). The lowest level of photo sharing is from Japan (29%), although a further 26% would be interested in doing so from this market.

% who have shared photos whilst on holiday, or would like to



Source: QM2. Which of the following have you done on holiday? And which would you like to do in future?

Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Sharing holiday videos online

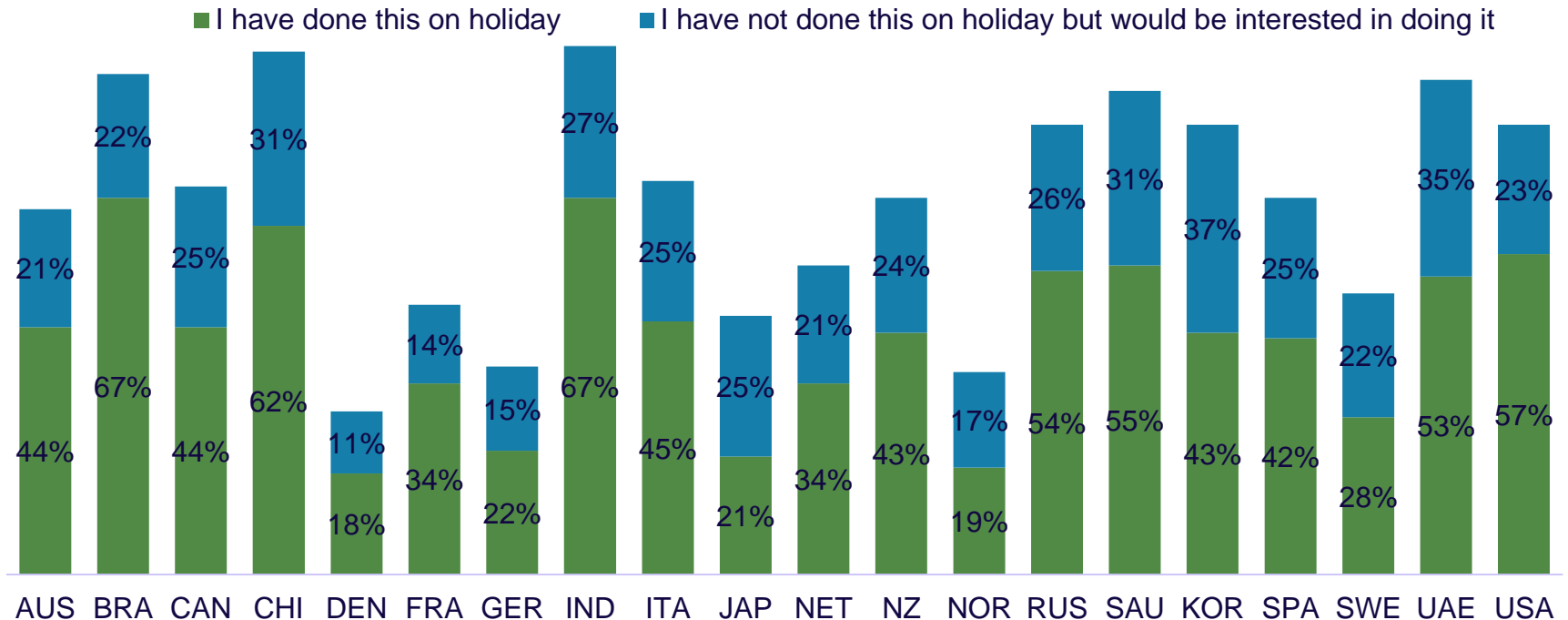
By market



Like photo sharing, Brazil (67%) and India (67%) lead the way, however China is close behind with 62% having shared videos whilst on holiday and a further 31% interested in doing it.

European markets Denmark, Norway and Germany are least likely to have done this, or be interested in doing so. A low proportion (21%) from Japan have done this, although a higher proportion (25%) are interested in doing so.

% who have shared videos whilst on holiday, or would like to



Source: QM2. Which of the following have you done on holiday? And which would you like to do in future?

Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Location technology

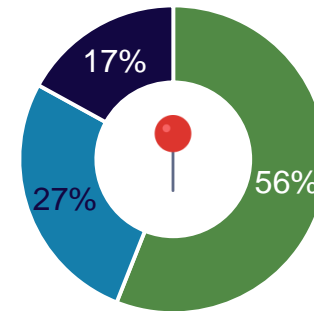


Over half have used location technology to find nearby places to visit when on holiday, and a further quarter would like to do this too.

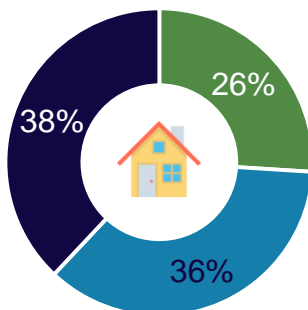
A quarter have used social media or the internet to meet up with locals or fellow travellers, with just over a quarter also interested in giving this a try.

When it comes to staying with a local host, a quarter have done this, and a further 36% would be interested in trying this, showing the influence of brands such as Airbnb.

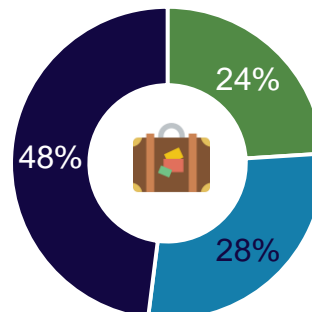
Used location technology to find places to visit nearby



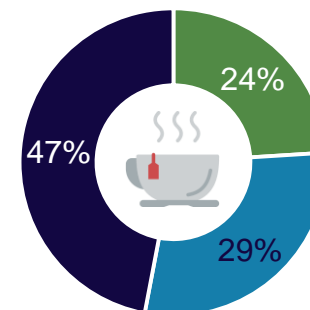
Stayed with a local host rather than hotel/b&b



Used social media or online method to meet up with fellow travellers



Used social media or online method to meet up with locals



Have done on holiday
Not done, but interested
Not done and not interested





Location technology

By age and gender



Over half have used location technology whilst on holiday, and this rises to 64% of those aged under 34. This age group is generally more likely to also have stayed with a local host rather than traditional accommodation, and used social media or the internet to meet up with locals or fellow travellers. Men are also more likely than women to do have used the internet to meet up with locals or other travellers.

Across all age groups, the appeal of staying with a local host is fairly high, and whilst a smaller proportion have already done this, a relatively large proportion are interested in doing so.

%		Total	Male	Female	18-34 years old	35-54 years old	55+ years old
<i>Used location technology to find places to visit nearby</i> 	Have done	56%	55%	57%	64%	58%	40%
	Interested in	27%	27%	26%	26%	27%	27%
<i>Stayed with a local host rather hotel /b&b</i> 	Have done	26%	27%	25%	31%	26%	19%
	Interested in	36%	37%	35%	39%	37%	30%
<i>Used social media or online to meet up with fellow travellers</i> 	Have done	24%	27%	22%	32%	25%	11%
	Interested in	28%	28%	27%	33%	28%	20%
<i>Used social media or online to meet up with locals</i> 	Have done	24%	27%	22%	32%	25%	11%
	Interested in	29%	30%	29%	34%	29%	22%

Source: QM2. Which of the following have you done on holiday? And which would you like to do in future?

Base: All Respondents (11,400), Male (5,821), Female (5,579), 18-34 (4,020), 35-54 (4,016), 55+ (2,437)

Location technology

By market



Using location technology when on holiday to find local places to visit is a fairly common activity, with the most active smartphone users more likely to do this – Brazil, China, India, Italy and Saudi Arabia.

Using social media to meet up with travellers or locals is not as common, and very few in France, Germany and the Nordics have done this, compared to more in Brazil and India.

% Strongly agree & agree		TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Used location technology to find places to visit nearby	Have done	56%	52%	78%	49%	73%	47%	46%	37%	68%	65%	32%	52%	57%	50%	63%	67%	62%	62%	49%	49%	63%
	Interested in	27%	25%	18%	28%	24%	22%	32%	23%	27%	21%	32%	25%	26%	28%	28%	28%	32%	30%	28%	38%	26%
Stayed with a local host rather hotel /b&b	Have done	26%	20%	27%	27%	34%	20%	32%	22%	42%	24%	21%	21%	27%	14%	32%	34%	24%	19%	18%	38%	37%
	Interested in	36%	38%	39%	34%	54%	29%	39%	31%	41%	31%	28%	28%	36%	27%	42%	40%	52%	31%	35%	42%	35%
Used social media or online to meet up with fellow travellers	Have done	24%	21%	49%	23%	43%	6%	9%	9%	54%	19%	15%	10%	21%	8%	31%	43%	30%	20%	16%	39%	38%
	Interested in	28%	28%	27%	24%	40%	16%	22%	15%	35%	25%	27%	19%	29%	19%	35%	37%	44%	28%	25%	43%	28%
Used social media or online to meet up with locals	Have done	24%	21%	55%	23%	37%	4%	9%	9%	53%	20%	17%	12%	18%	7%	32%	45%	26%	23%	13%	40%	36%
	Interested in	29%	30%	28%	24%	44%	17%	33%	18%	34%	26%	27%	25%	30%	23%	31%	30%	46%	29%	25%	44%	28%

Source: QM2. Which of the following have you done on holiday? And which would you like to do in future?

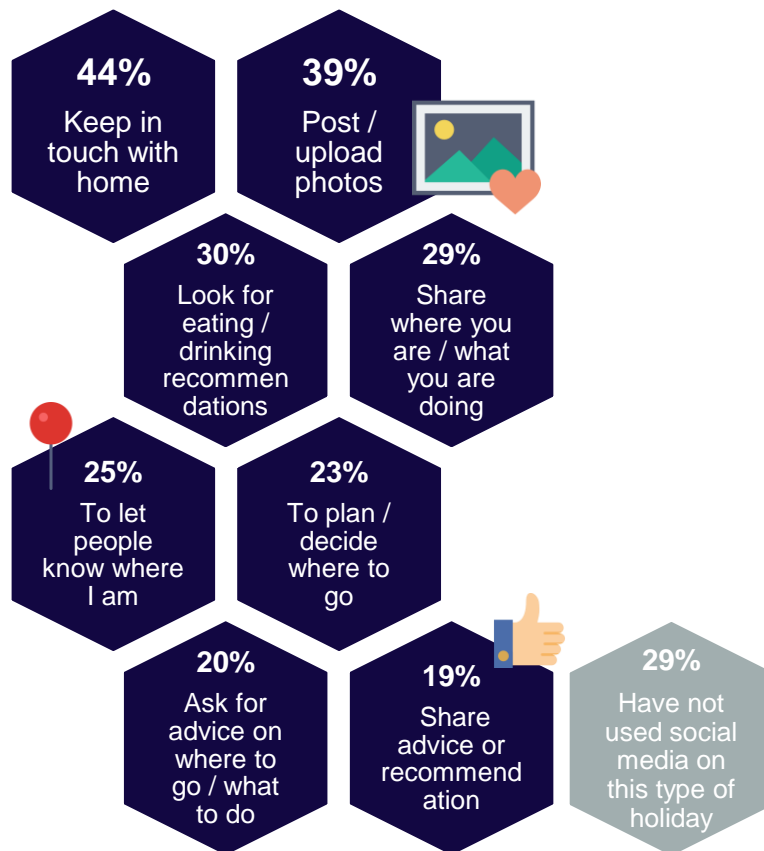
Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)



Social media usage on last holiday

Using social media on holiday

% who did the following on their last foreign holiday / trip to Britain



Keeping in touch with friends and family back home is the key reason that most people say they use social media when on holiday.

Sharing is also important and over a third are likely to post photos whilst on holiday, and 29% are sharing what they are doing, and 19% have shared recommendations.

Social media is also used as a way of getting information on holiday, as 30% have used it to get recommendations on places to eat or drink, 23% to help them plan where to go, and 20% to ask for advice on what to do or where to go.

A smaller proportion (19%) would share their own advice or recommendations whilst on holiday.

Despite a wide range of social media uses, 29% say that they have not used social media on their last holiday to Britain or a foreign destination.

Using social media on holiday

By age and gender

Women are more likely than men to have used social media to keep in touch with people at home. They are also more likely to have posted photos of their holiday and shared their location or activity online.

When it comes to age, those aged 18-34 are more likely to have used social media overall on their last holiday or trip to Britain, especially for keeping in touch with people at home, or posting photos of their holiday.

<i>% who did the following on their last foreign holiday / trip to Britain</i>	TOT	Male	Female	18-34 years old	35-54 years old	55+ years old
To keep in touch with people at home	44%	40%	47%	47%	43%	38%
To post / upload photos of my holiday	39%	36%	42%	46%	41%	26%
Look for recommendations for places to eat or drink	30%	29%	31%	34%	31%	20%
Share with others where you are / what you are doing while on holiday	29%	27%	32%	35%	31%	19%
I have not used social media at all on this type of holiday	29%	31%	27%	21%	27%	43%
To let people know where I am at a given moment (e.g. checking in on Facebook)	25%	25%	25%	30%	25%	16%
To help you plan / decide where to go or what to see or what to do	23%	23%	23%	27%	24%	15%
Ask for advice on where to go or what to do	20%	20%	19%	24%	20%	12%
Share my own advice or recommendations about visiting where I am	19%	20%	17%	22%	21%	10%

Using social media on holiday

By market

Keeping in touch is the primary reason for using social media for travellers from most markets. Travellers from China, UAE and Japan are more likely to be using social media to look for food and drink recommendations.

Certain markets are less likely to use social media on their holiday – almost half from Denmark and Germany, and high proportions from France and Japan say that they did not use social media at all.

<i>% who did the following on their last foreign holiday / trip to Britain</i>	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
To keep in touch with people at home	44%	50%	61%	42%	56%	35%	35%	31%	58%	37%	18%	40%	57%	52%	57%	50%	30%	35%	48%	36%	41%
To post / upload photos of my holiday	39%	42%	59%	35%	49%	24%	30%	22%	54%	44%	21%	35%	48%	39%	43%	39%	39%	37%	35%	41%	46%
Look for recommendations for places to eat or drink	30%	23%	47%	22%	56%	18%	19%	15%	44%	28%	22%	15%	26%	30%	33%	39%	34%	27%	27%	39%	34%
Share with others where you are / what you are doing while on holiday	29%	30%	47%	22%	50%	17%	17%	13%	50%	23%	13%	23%	41%	26%	37%	30%	31%	22%	26%	45%	34%
I have not used social media at all on this type of holiday	29%	26%	13%	32%	19%	49%	45%	47%	21%	26%	35%	33%	24%	31%	17%	15%	20%	31%	30%	33%	30%
To let people know where I am at a given moment (e.g. checking in on Facebook)	25%	29%	39%	21%	30%	12%	13%	11%	46%	20%	14%	22%	32%	23%	27%	23%	28%	16%	21%	44%	34%
To help you plan / decide where to go or what to see or what to do	23%	20%	35%	17%	37%	10%	14%	11%	39%	18%	23%	14%	24%	13%	28%	29%	36%	21%	18%	39%	28%
Ask for advice on where to go or what to do	20%	14%	39%	12%	43%	6%	11%	11%	41%	17%	12%	5%	15%	9%	28%	35%	29%	15%	9%	32%	22%
Share my own advice or recommendations about visiting where I am	19%	14%	36%	12%	42%	5%	7%	6%	46%	13%	11%	6%	11%	9%	30%	28%	23%	15%	9%	39%	26%

Source: QS7. Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)



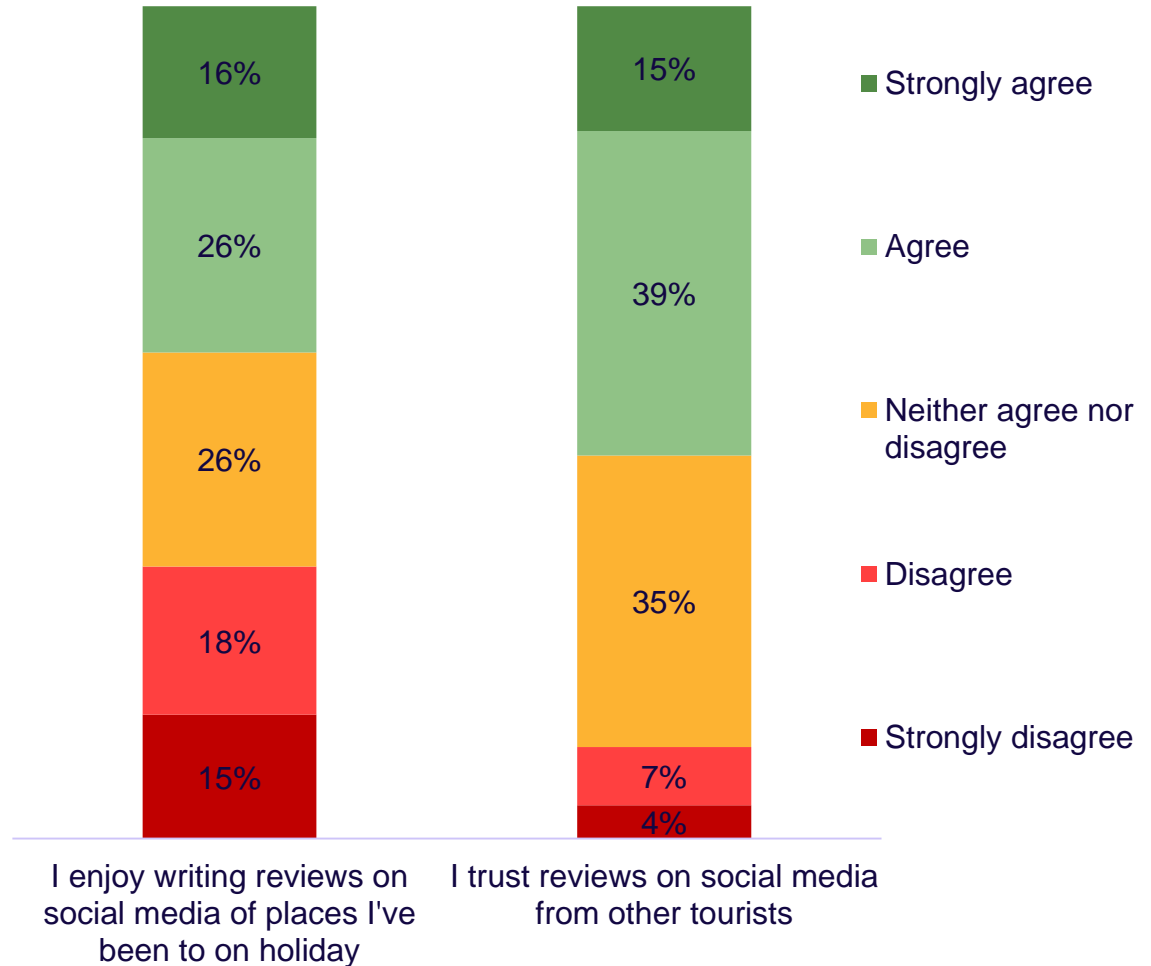
Writing and using reviews on holiday

Writing and using reviews on social media



Writing reviews gets a divided response. Whilst 42% agree that they do enjoy writing reviews about places that they have been to on holiday, a third do not enjoy writing reviews, and a quarter remain neutral.

Reviews are generally appreciated and trusted though, as over half (54%) say that they do trust reviews on social media from other tourists. Just 11% say that they don't trust reviews from peers on social media.



Writing and using reviews on social media

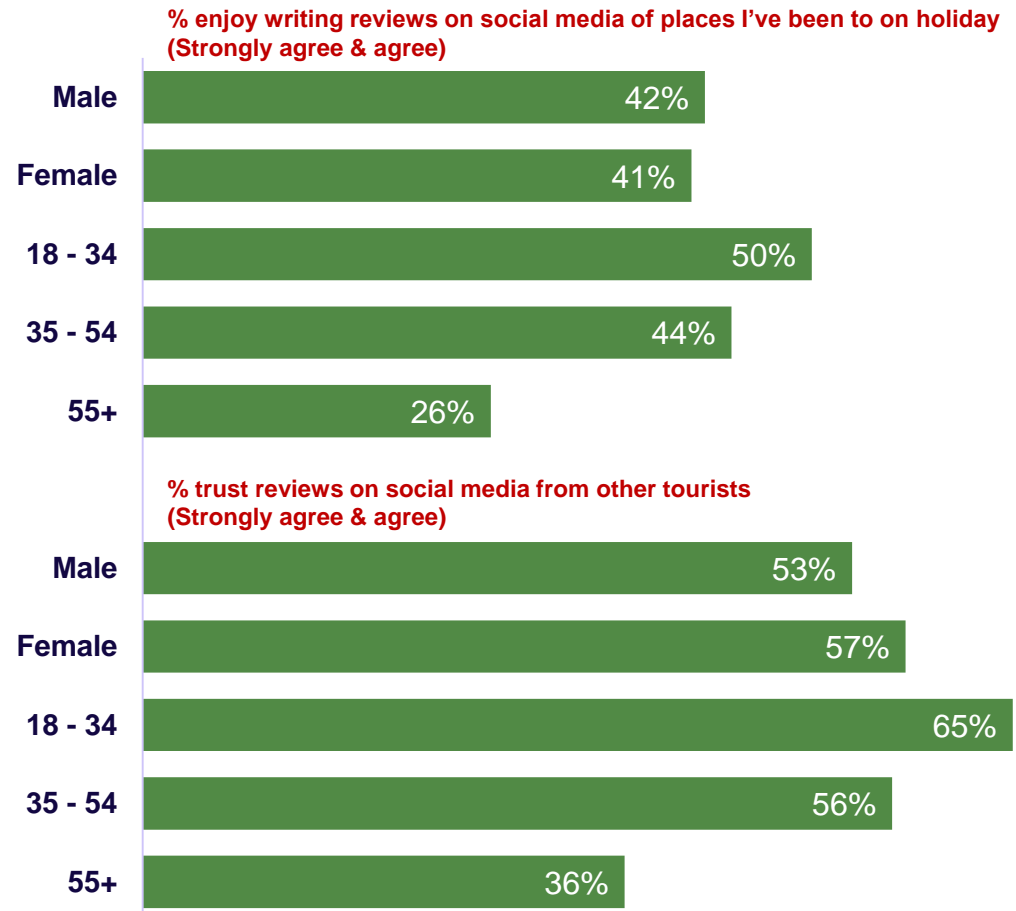


By age and gender

There is little difference between men and women when it comes to writing reviews, however women are more likely to say they trust reviews on social media than men (57% v 53%).

Half of those aged 18-34 enjoy writing reviews on social media of places they've been to on holiday. This falls to 44% amongst 35-54 year olds, and just a quarter of those aged 55+.

The younger age group are also more likely to say they trust reviews on social media (65%), over half of 35-54 year olds say they trust reviews and just a third of those aged 55+.



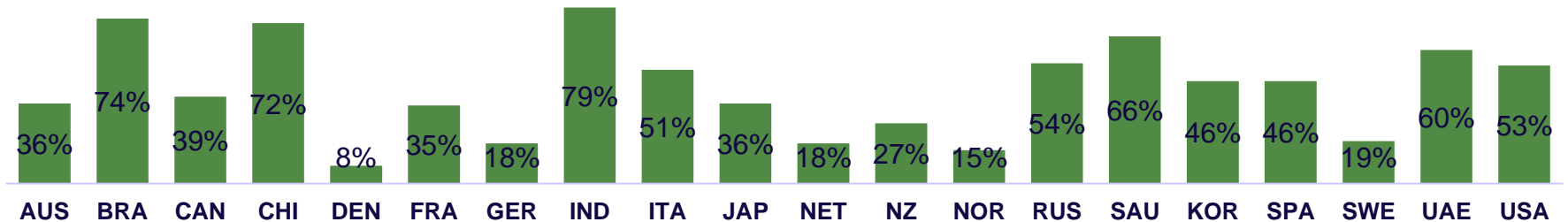
Writing and using reviews on social media

By market

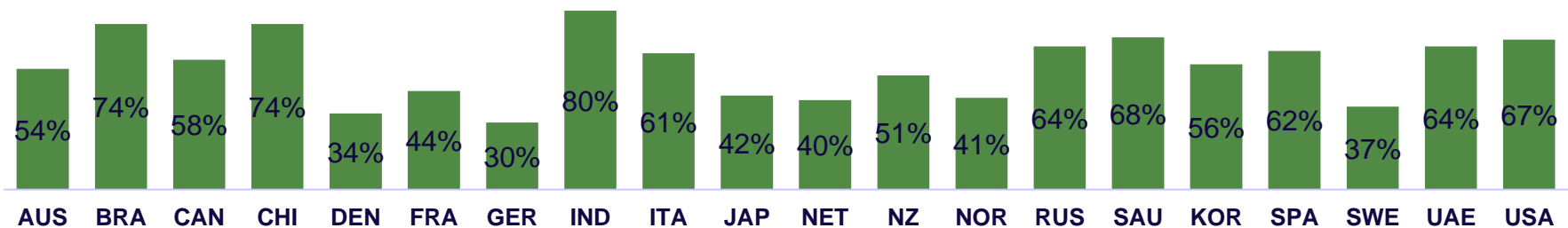


Those who like writing reviews on social media, are also more likely to trust reviews. This is most true for markets such as Brazil, China, Indian, Russia, Gulf and USA. The Nordic markets, and Germany are least likely to enjoy writing reviews (just 8% in Denmark), and have some of the lowest levels of trust too.

**% enjoy writing reviews on social media of places I've been to on holiday
(Strongly agree & agree)**



**% trust reviews on social media from other tourists
(Strongly agree & agree)**



Source: QM3. To what extent do you agree with the following statements?

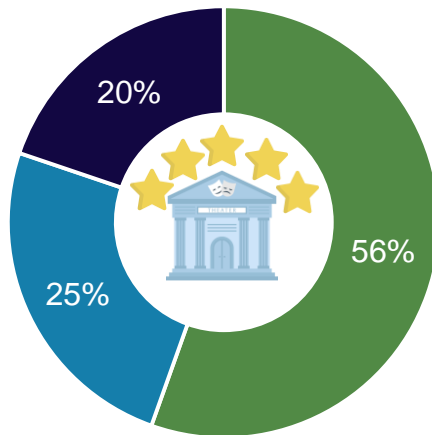
Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Using smartphone to access reviews

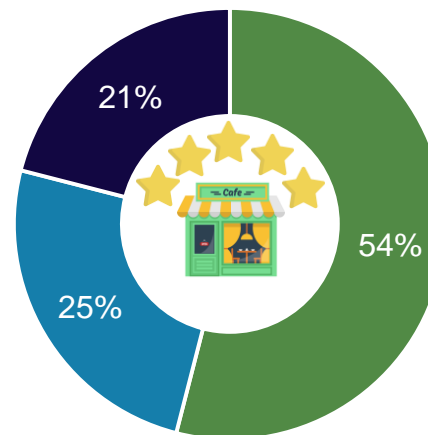
Over half have already used their smartphone to access reviews on attractions (56%), with a further quarter interested in trying this on future holidays. Just a fifth have no interest in trying this out.

The pattern is similar for accessing reviews about places to eat and drink, and 54% have already used their smartphone to do this. A further quarter would be interested in trying this out, and just 21% have no interest at all.

Used a smartphone to access reviews about attractions / places to see



Used a smartphone to access reviews about places to eat or drink



Have done on holiday

Not done, but interested

Not done and not interested

Using a smartphone to access reviews

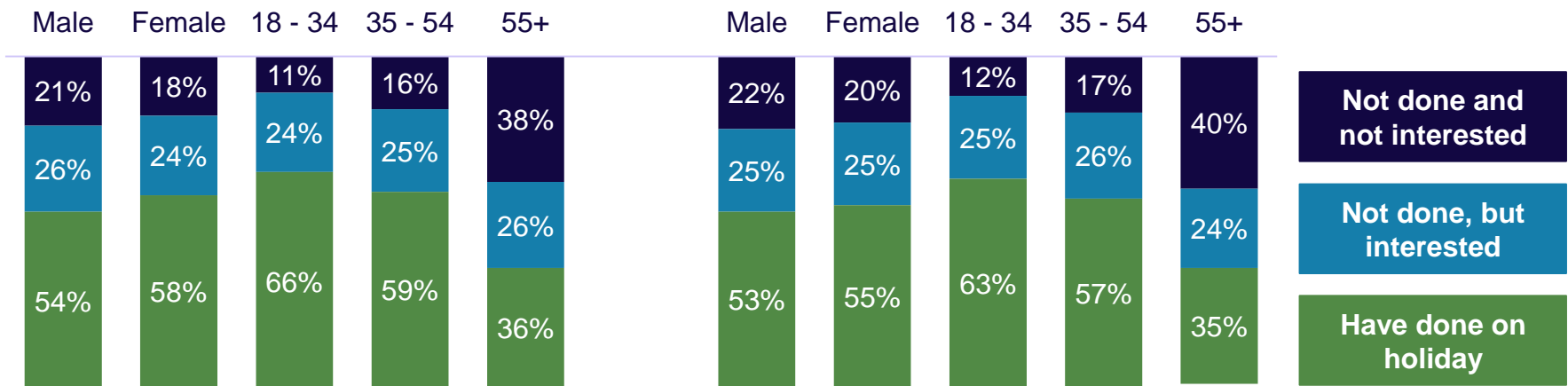
By age and gender



Women are slightly more likely to use their smartphone to access reviews, especially for attractions or places to see. Younger travellers also much more likely to use their smartphone for reviews, with two thirds of those aged 18-34 years old accessing reviews about attractions on their smartphone. This contrasts with travellers aged over 55, where just over a third have done so.

Used a smartphone to access reviews about attractions / places to see

Used a smartphone to access reviews about places to eat or drink



Source: QM2. Which of the following have you done on holiday? And which would you like to do in future?

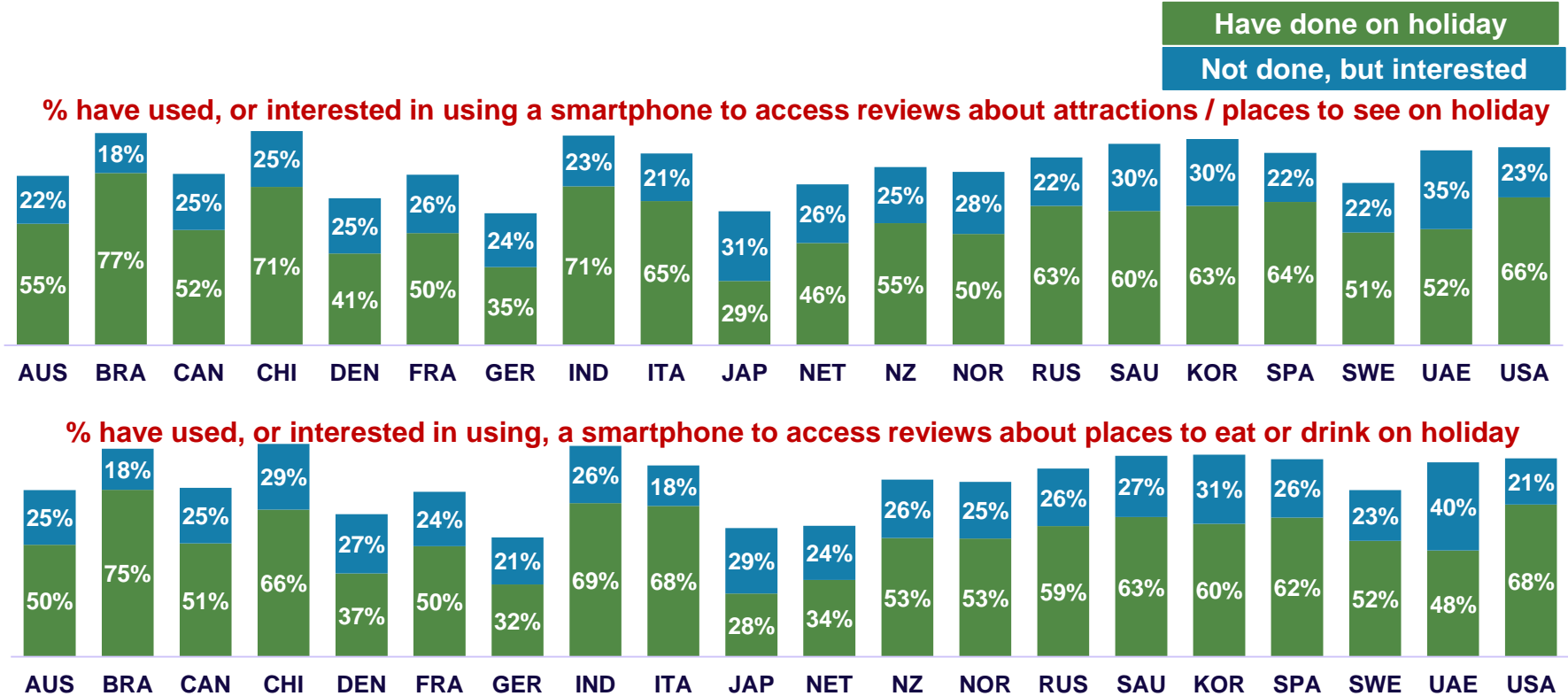
Base: Male = 5,821, Female = 5,579, 18-34 = 4,258, 35-54 = 4,287, 55+ = 2,854

Using a smartphone to access reviews

By market



Amongst European markets, Italians and Spanish are most likely to use reviews on their smartphone, whilst Germany and Denmark are least likely to. Just over half in Canada and two thirds in USA are using smartphone reviews, and throughout the rest of the world Brazil, China, India, South Korea and Russia are most likely to be accessing reviews on their smartphones.



Source: QM2. Which of the following have you done on holiday?

Base: All Respondents (11,400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)



Technology barriers

The cost of using a smartphone abroad



“I wish it was cheaper to use my smartphone when abroad”



An overwhelming proportion (83%) of smartphone owners wish that using their phone when abroad was more affordable. Half strongly agree that it should be cheaper to use their smartphone when travelling, and a further third agree with the statement. A very small proportion (3%) disagree, however overall this does vary by market. The full market breakdown is on the following slide.

The cost of using a smartphone abroad

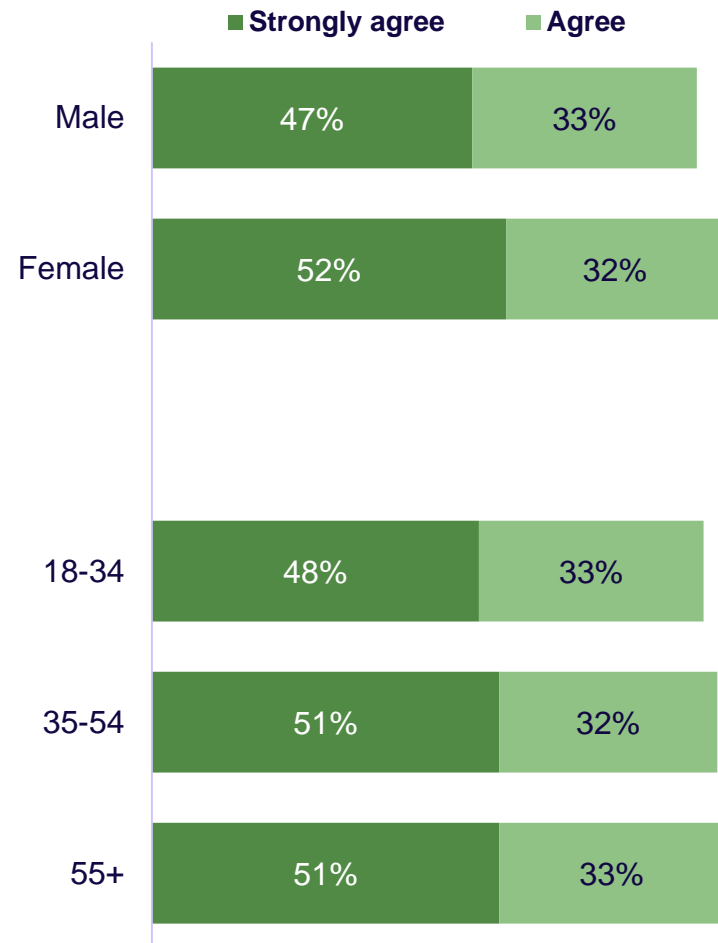
By age and gender

Women are more likely to be price conscious when it comes to the cost of using smartphones abroad. Over half strongly agree that it should be cheaper, compared to just under half of men.

There is minor difference in perceptions when it comes to age – those aged 55+ are more likely to say they are price conscious, compared to those aged 18-34.



“I wish it was cheaper to use my smartphone when abroad”



The cost of using a smartphone abroad

By market

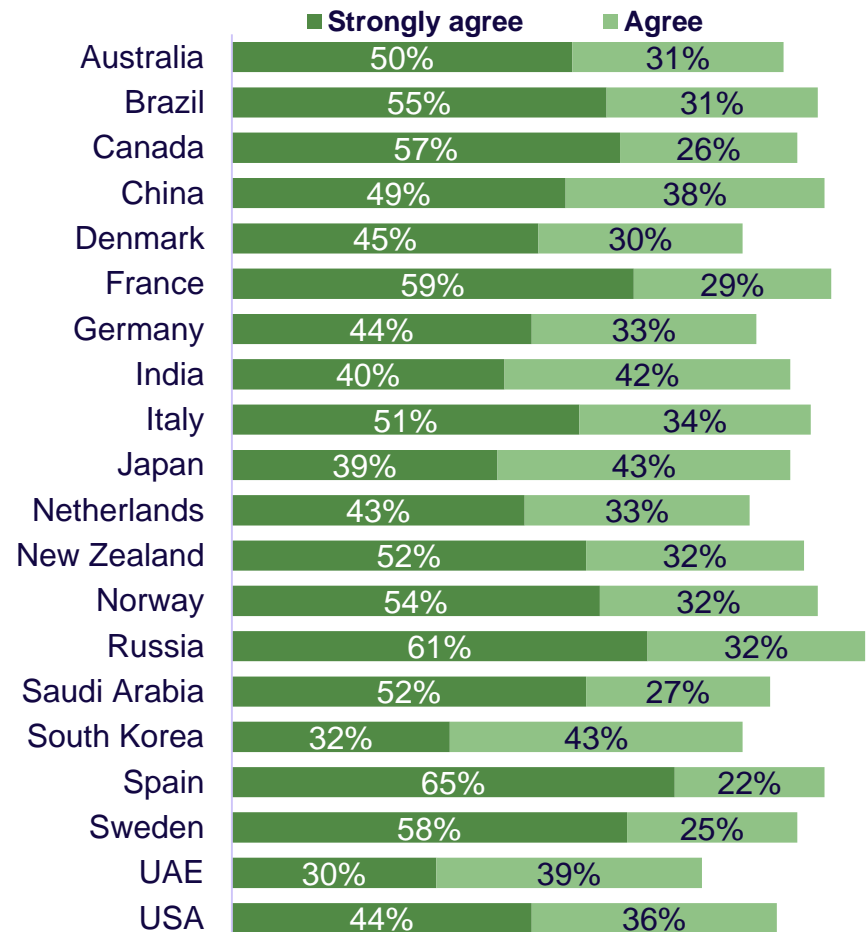
Travellers from all markets feel strongly that the cost of using their smartphone when abroad is too expensive.

The highest levels of agreement comes from Spain where 65% strongly agree that the cost of using smartphones abroad should be cheaper. Russia (61%), France (59%) and Sweden (58%) all have strong feelings about the cost too, although the majority in most markets strongly agree that the cost is too high.

Those who don't have as strong feelings about the cost are South Korea, UAE, Denmark, Netherlands and Germany.



"I wish it was cheaper to use my smartphone when abroad"



Source: QM3. To what extent do you agree with the following statements? "I wish it was cheaper to use my smartphone when in a foreign country"

Base: Smartphone owners (9,867), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)



Technology and Social Media

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