

Role of social media in the context of holidays

Foresight – issue 142

VisitBritain Research

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Contents

[Introduction](#)

[Summary](#)

[Background](#)

[Social media on holiday](#)

[Social media and the holiday process](#)

[Social media platforms](#)

[Social media platforms: South Korea](#)

[The language of social media](#)

[Social media content](#)

[Social media: advice and reviews](#)

[Review sites](#)

[Imagery from friends](#)

[Use of social media on holiday](#)

- [Germany](#)
- [India](#)
- [USA](#)
- [South Korea](#)

[Devices used to access social media on holiday](#)

[Time of day social media is used](#)

[The role of Wi-Fi](#)

[Content to inspire](#)

[Methodology](#)

Introduction

Over the past ten years there has been exceptional growth in the accessibility, use and content of social media – not just in the context of tourism but it is becoming an essential tool in our everyday lives. As social media has changed the way the world connects, communicates and shares information, VisitBritain commissioned a research project to look at the role of social media in the context of overseas holidays. This project was run in four markets – USA, Germany, India and South Korea.

While word of mouth from family and friends, press, TV, internet and books are all key sources of information for people planning and taking holidays, social media offers unparalleled opportunities to engage directly with potential visitors about Britain at all stages of the holiday planning cycle, with passion, authenticity and conviction.

As social media is integral in most tourism marketing undertaken by VisitBritain, understanding its role in the marketing mix is paramount to ensure timely engagement with audiences, with the right message to inspire travel to Britain – to move Britain from being a place to travel to at some stage, to a ‘must go now’ destination and to encourage visitors to explore more of Britain than ever before.

Summary

- 67% of respondents said they had used social media on a foreign holiday
- Facebook was the most commonly used social media platform for respondents in all stages of the holiday process and therefore should be integrated into any social media activity
- Language is important in social media and should be in the native language of the target market, where necessary. Social media should connect with a user and demonstrate an understanding of their world
- Content and photographs posted on social media by friends was seen as particularly motivating to encourage holidaying in a destination, as opposed to professionally created content. So too were friends' photographs
- While professional content is important in social media, advice and reviews from recent holiday-makers was preferred
- Keeping in touch with friends and family back home was the most common use of social on holiday, with sharing their own advice and recommendations receiving the lowest levels of support
- Smartphones were the most common device used to access social media on holiday, but there were high levels of use on other devices, which suggests social media content should be optimised to perform across all platforms
- Respondents agreed access to Wi-Fi was important and places to stay, see and eat which offered free Wi-Fi were more likely to be selected ahead of places that did not
- A number of content ideas tested well in this research. This included good places to eat, holiday itineraries by theme and notifications for nearby events. Competitions for using social media were the least appealing, with recognition and publication of content seen as more motivating to encourage holiday-makers to generate content

Background

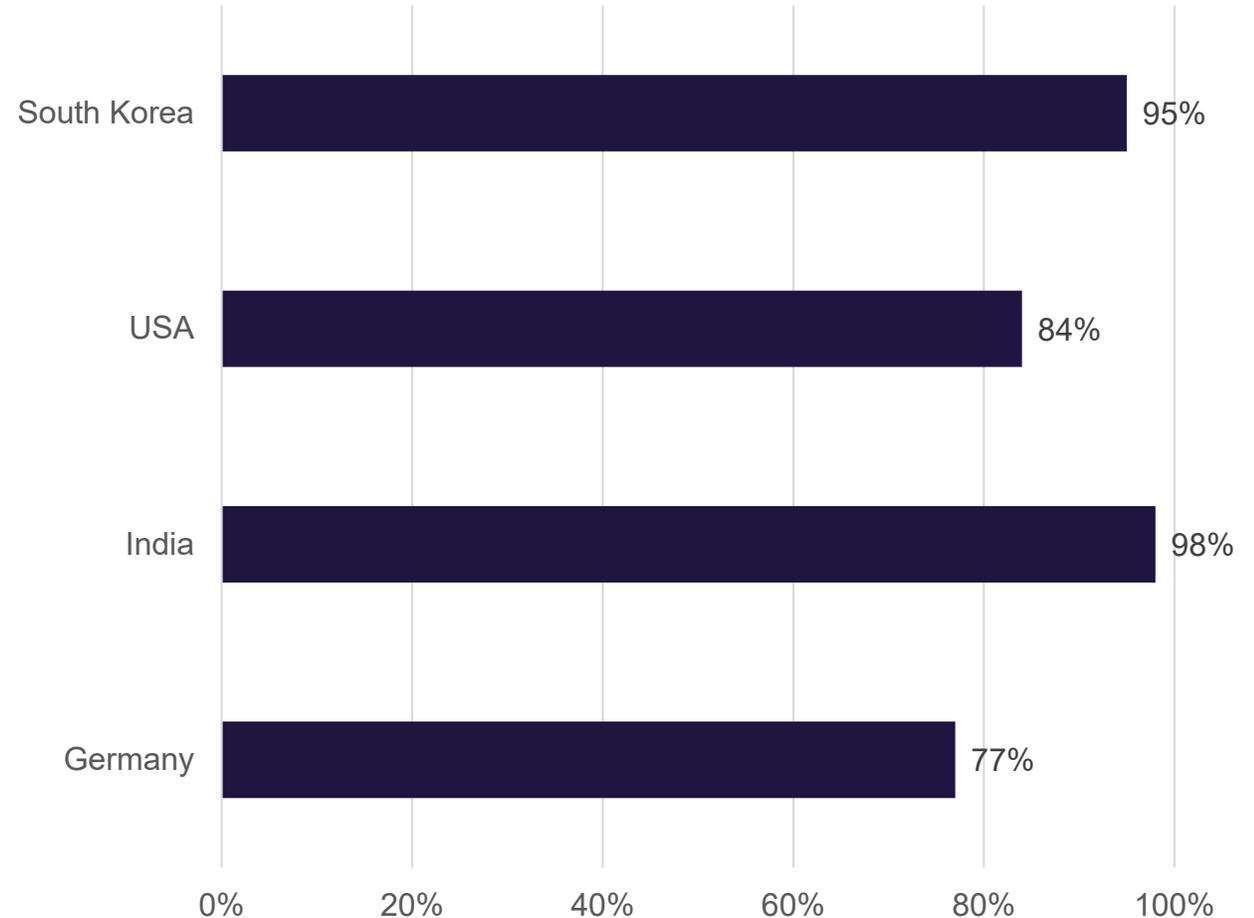
	2014 Visits (000s)	% change from 2013	2014 Spend (£millions)	% change from 2013
Germany	3,180	5%	1,457	+8%
India	418	4%	461	-3%
South Korea	210	1%	199	+1%
USA	2,977	8%	2,946	+17%

- In 2014, Germany, India, South Korea and the USA contributed 19% of all inbound UK visits and 22% of all UK visitor spending. All of these markets reported an increase in both visits and spending in 2014, compared to 2013 (with the exception of India where spend decreased by 3% in 2014)
- Germany has been ranked second behind France since 2009 for volume of visits to the UK with the USA holding third place since 2008 (only dropping to 4th once in 2009). In 2014 USA and Germany held first and second place respectively for total inbound visitor spending
- In the ten years since 2004, the UK has seen a 64% increase in the number of visits from India, with spending levels close to doubling. In 2012 India was ranked within the top 20 projected UK growth markets*
- In emerging markets like South Korea, VisitBritain is working closely with our international offices and partners

Social media on holiday

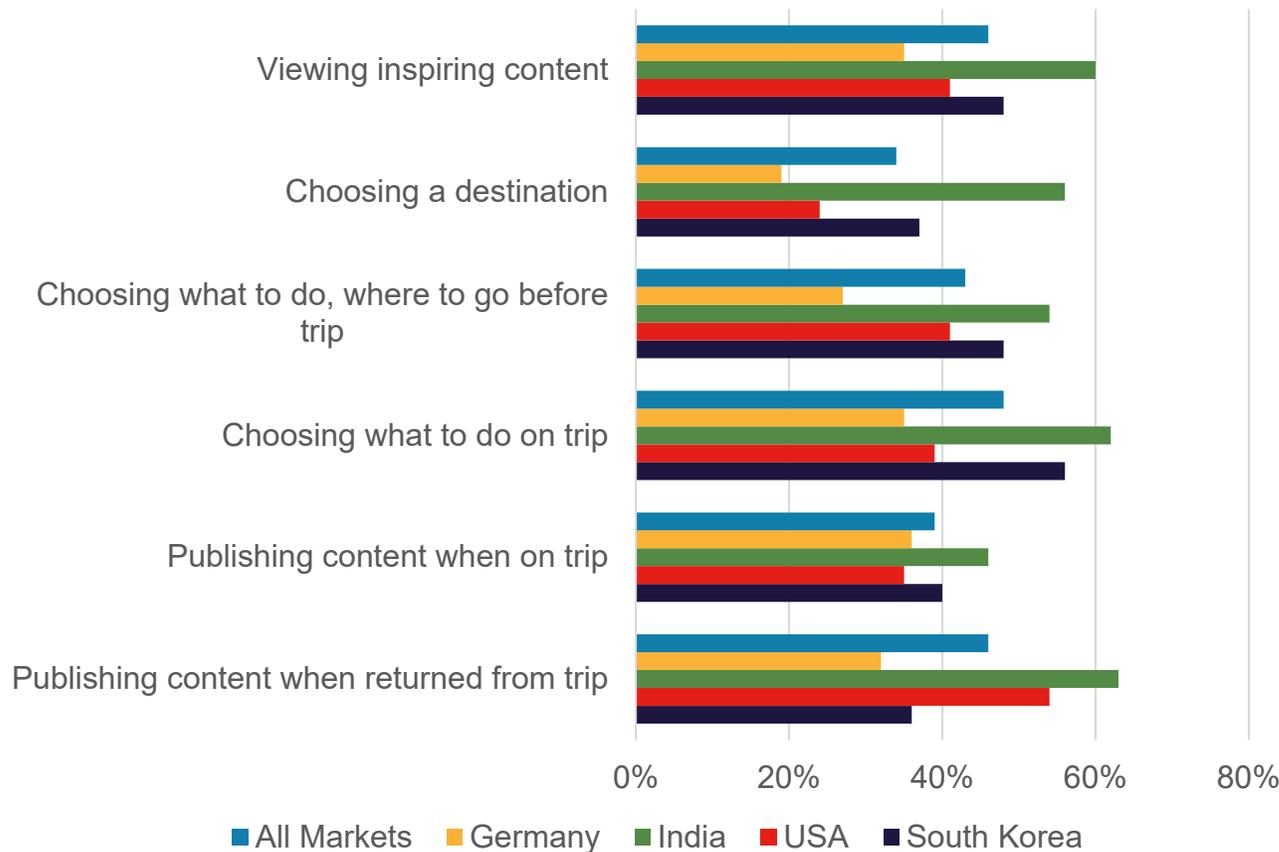
- As seen in the chart to the right, there are high levels of social media use amongst visitors in the context of holidays
- Across all the markets, the majority of respondents indicated they had previously used social media for a range of activities around holiday planning and experiences, including on holiday and once returning home
- The market that uses social media the most on holiday is India with 98%, and the market that uses social media the least is Germany with 77%

Propensity to use social media on holiday



Social media and the holiday process

Proportion using social media at each stage of the holiday process, by market



- When looking at each stage of the holiday cycle in more detail, a high proportion of respondents indicated they had used social media at every stage
- The area where the use of social media was at its lowest for all markets was for 'choosing a destination' but still 1 in 3 said they had turned to social media to decide where to go on a foreign holiday
- Social media was particularly popular in South Korea for destination advice and information while on holiday with 56%, closely followed by viewing inspirational content (48%) and choosing what to do ahead of a trip (48%)
- For respondents in India and the USA, publishing content once home was the most commonly cited holiday process activity undertaken on social media, 63% and 54% respectively
- Generally German respondents had lower levels of agreement across all stages measured, with publishing content whilst on a trip (36%) leading out over destination advice (35%) and seeking inspirational content on social media (35%)

Social media platforms

	Deciding to visit Britain	Planning what to do and see on holiday before travelling	Choosing what to do on trip	Share holiday experiences while on holiday	Share holiday experiences once returned home
Facebook	44%	43%	40%	42%	41%
YouTube	34%	35%	23%	18%	18%
Twitter	15%	18%	21%	18%	16%
Instagram	12%	15%	10%	14%	13%
Pinterest	7%	10%	7%	6%	6%
Tumblr	4%	5%	4%	4%	4%
Flickr	3%	4%	3%	3%	4%
Google+	19%	21%	17%	14%	16%

- Facebook was the most common platform of social media across all aspects of the holiday process, particularly when respondents were deciding to visit Britain with 44%
- YouTube's strengths were around influencing respondent's decision to visit Britain (34%) and in the planning stages (35%) before actually departing on holiday
- Around 1 in 5 used Twitter for suggestions and advice by respondents when actually on holiday
- Instagram has almost equal proportions with respondents using it during planning (15%), but also to share holiday experiences both when on holiday and when they have returned home (14% and 13% respectively)
- Pinterest, Tumblr, Flickr and Google+ were all seen as most appropriate for planning what to see and do on holiday (with Flickr also holding an equal score for sharing holiday experiences once returned from holiday)

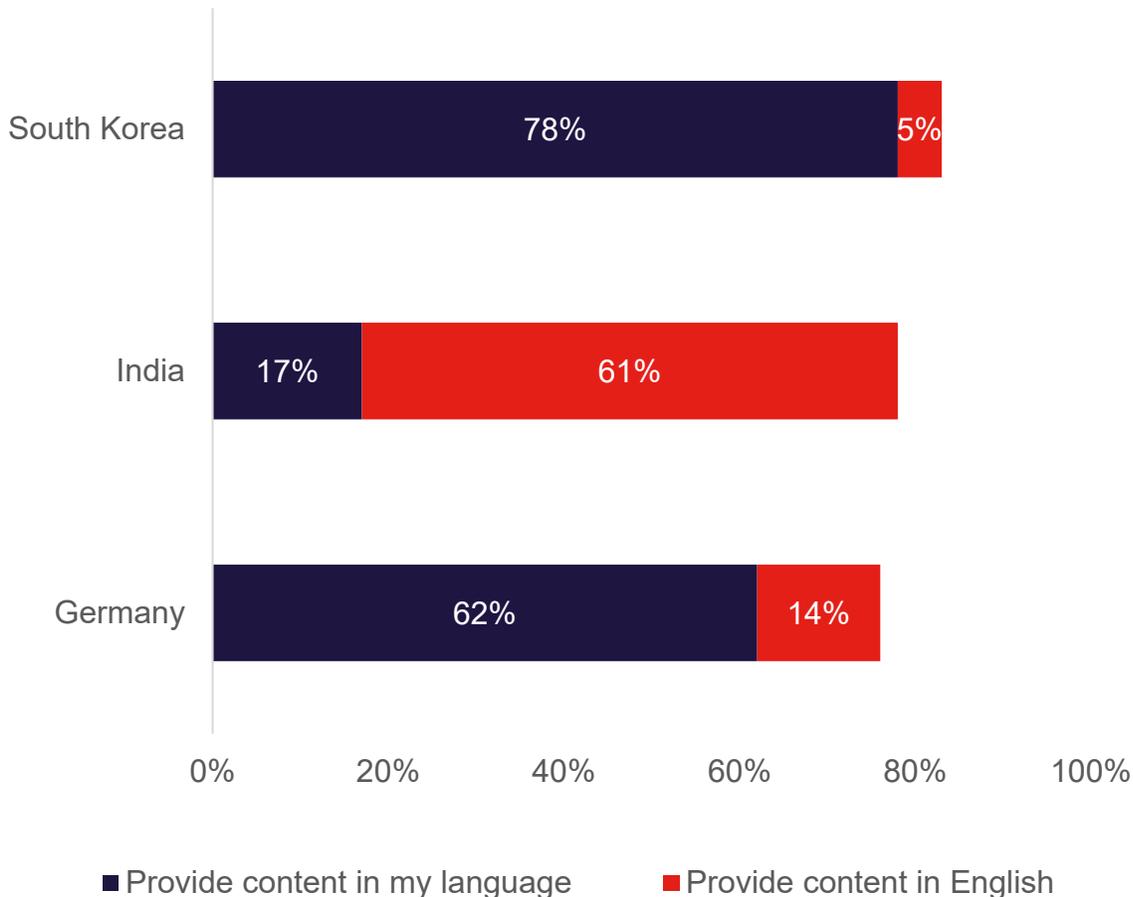
Social media platforms: South Korea

- In South Korea, as well as Facebook, we specifically asked about three national platforms – Naver Blog, Naver Café and Kakao Story
- The use of Naver Blog is almost on par with Facebook amongst South Korean respondents particularly for deciding to visit Britain and during the planning stages
- In terms of suggestions and advice when on holiday, Facebook has a slight advantage over the national platforms with 32%
- Kakao Story (although not as high as Facebook) was widely used for sharing holiday stories once visitors has returned home (27% vs 29%). This suggests that the use of native social media platforms are high

	Deciding to visit Britain	Planning what to do and see on holiday before travelling	Choosing what to do on trip	Share holiday experiences while on holiday	Share holiday experiences once returned home
Facebook	30%	34%	32%	30%	29%
Naver Blog	28%	33%	22%	16%	20%
Naver Café	24%	29%	25%	17%	18%
Kakao Story	24%	31%	24%	23%	27%

The language of social media

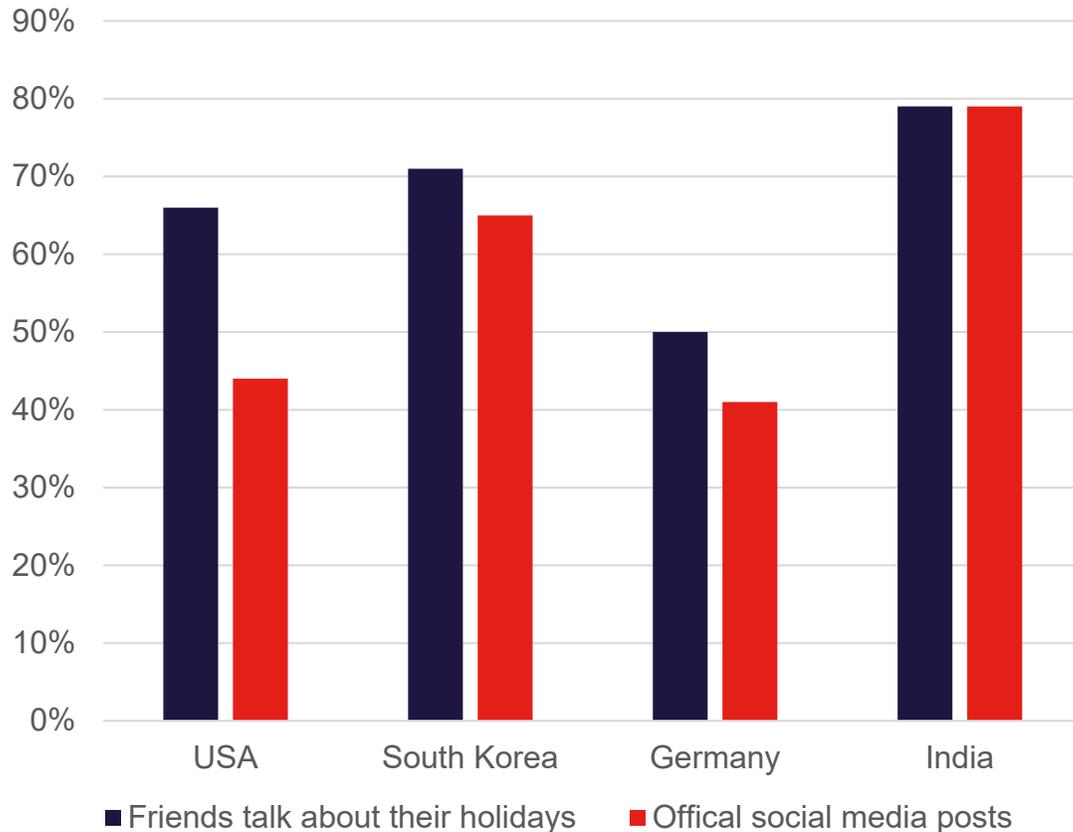
“Which of the following factors do you personally feel would be better to encourage people to take a holiday in Britain?”



- Exploring the use of native social media in more detail respondents were asked their preferred social media language (this question was not asked of respondents in the USA)
- Amongst those in South Korea and Germany, respondents preferred content in their native language (78% and 62% respectively) against only 5% who preferred English in South Korea and 14% in Germany
- It was only amongst those in India (where English is more widely spoken and understood) that English social media content was preferred – 61% preferring English language social media vs. just 17% in their native language
- Furthermore, respondents expressed a desire for content on social media to demonstrate an understanding of ‘their world’ – to connect with them on what stimulates, frustrates, worries and excited them. Content which does not connect with respondents hinders audience engagement – at least 3 in 4 agreed with the statement that social media should be both entertaining and informative

Social media content

Social media content, by source for encouraging a visit to a place



- Social media allows anyone/ any organisation to create and publish material, therefore this graph looks at what respondents said inspired them to want to visit a destination and compares content from professionals and experts against content from friends
- In South Korea, the USA and Germany higher proportions agreed it was seeing their friends talking about their holidays as opposed to social media posts from official sites that would inspire them to visit a place
- In India equal proportions said content from friends and official posts made them want to visit a place
- This highlights the important of encouraging visitors to Britain to talk about their holiday experiences on social media as this is likely to position Britain as one of the top destinations for their holiday

Social media: advice and reviews

- Content on social media is very versatile as it comes from holiday-makers and experts whom offer a wide range of information from general advice through to reviews.
- The tables opposite show the preferences of respondents, by market, for source of advice and reviews. In both cases content from holiday-makers was seen as better for encouraging a visit to Britain, than that from experts
- In India, South Korea and the USA advice from tourists who had recently visited Britain outshone expert advice
- In Germany the results were slightly different with a higher proportion favouring expert reviews over reviews from friends
- In all markets there was a strong swing towards recent holiday-makers as a source of reviews to encourage visiting – as opposed to reviews by experts.
- In the USA 44% of respondents preferred reviews from recent holiday-makers which was the only market where the preference towards holiday-makers for reviews was lower than that for advice
- Despite a clear preference towards advice and reviews from holiday-makers there is a role for expert content. In fact, 81% of respondents felt it was important for an organisation like VisitBritain to have a presence on social media, indicating a complimentary role for holiday-maker and professional content

Preference for advice from experts vs. holiday-makers

	Advice from experts	Advice from holiday-makers
South Korea	29%	48%
India	27%	48%
Germany	42%	28%
USA	31%	46%

Preference for reviews from experts vs. holiday-makers

	Reviews from experts	Reviews from holiday-makers
South Korea	23%	52%
India	25%	50%
Germany	33%	39%
USA	32%	44%

Review sites

	Germany	India	USA	South Korea	All Markets
Read a review	81%	84%	59%	79%	76%
Written a review	19%	28%	12%	18%	19%

- Social media isn't the only source of user reviews available. In recent times, review sites have grown in popularity and their use has become an established 'go to' place for travel information
- 76% of the respondents in this survey said they had read a review when thinking about taking a holiday. In contrast, smaller proportions indicated they had actually written a review on a site (19%)
- By market, those in Germany and India had the highest propensity to use a holiday review site (for reading and writing), followed by South Korea
- Those in the USA showed the lowest use of review sites, but still 3 out of 5 respondents had visited at least one review site to read a review
- The review websites most likely to have been used were Expedia, TripAdvisor, Trivago and Hostelworld across all markets

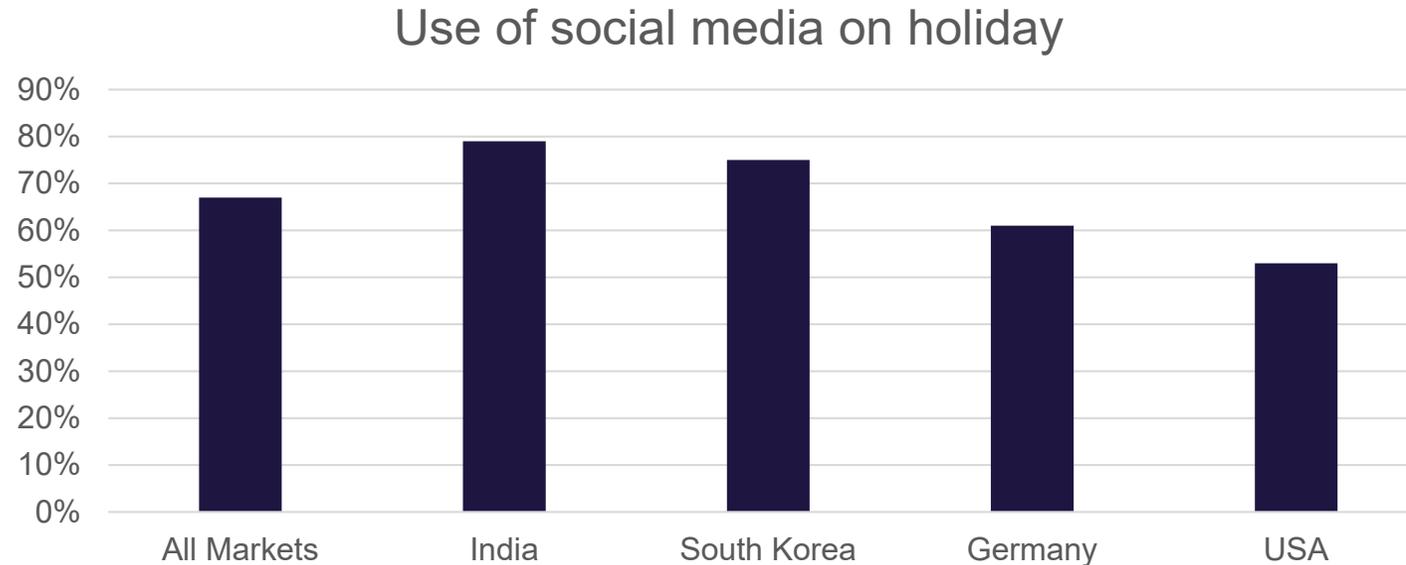
Imagery from friends

“Friends’ holiday photos on social media makes me want to visit that place”

	Strongly agree	Slightly agree	Slightly disagree	Strongly disagree
South Korea	18%	57%	4%	0%
India	42%	40%	4%	1%
Germany	13%	40%	11%	7%
USA	22%	46%	4%	2%

- As we saw previously, hearing friends talk about their holidays encouraged a visit to a place, but photos from friends received even higher levels of agreement – suggesting photos have the ability to be even more motivating for consumers in creating desire to visit a place
- Photos attracted particularly strong levels of agreement amongst those in India and South Korea – 82% and 75% respectively agreeing seeing friends’ holiday photos on social media makes me want to visit a place
- In the USA around 7 out of 10 people agreed, whilst in Germany just over half of respondents agreed friends’ holiday photos made them want to visit a place

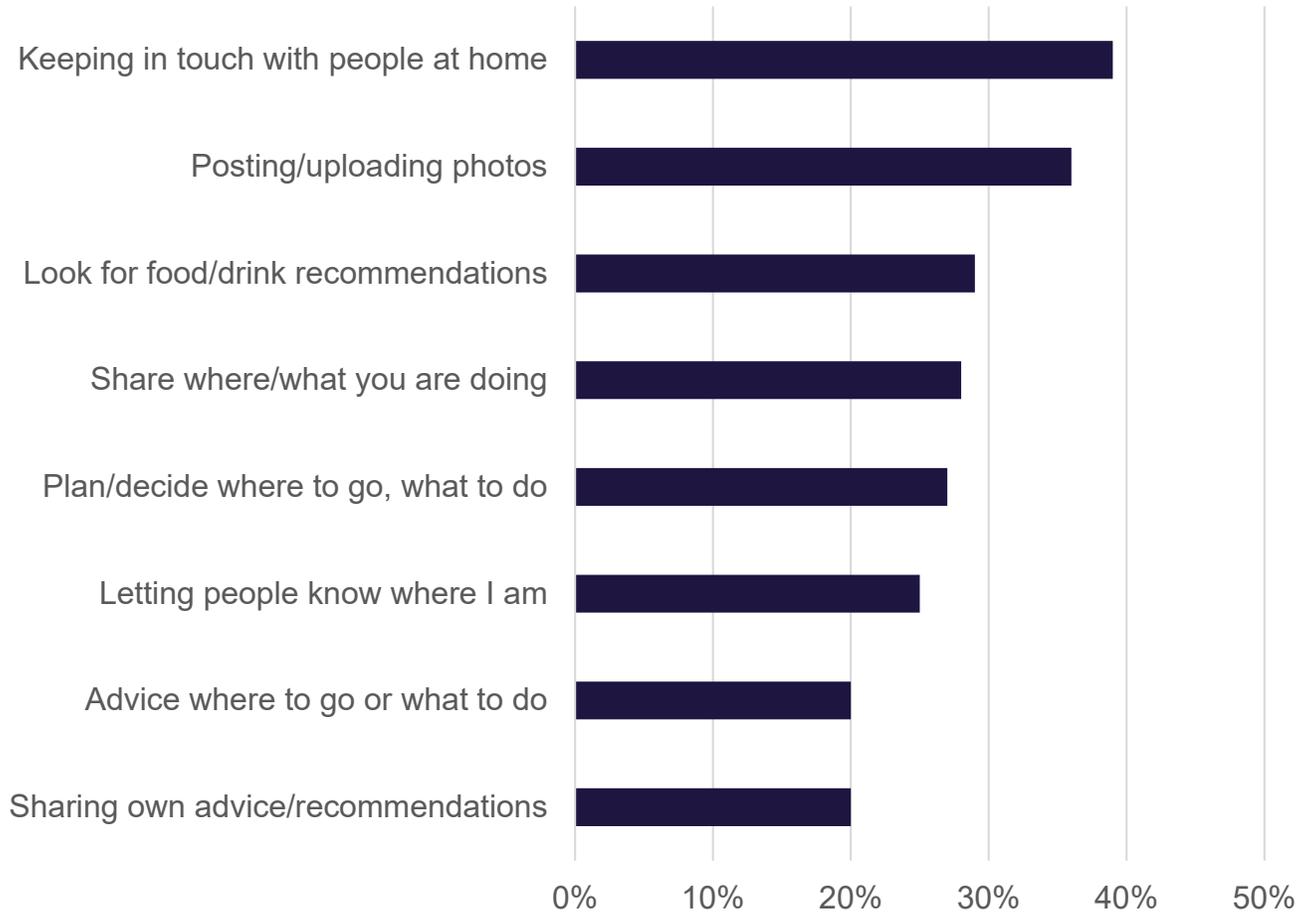
Use of social media on holiday



- Four out of six respondents (67%) indicated they had used social media whilst on a foreign holiday. While this varied slightly by market the majority of respondents indicated they had used social media on holiday
- Respondents in Germany, India and the USA all ranked 'keeping in touch with friends and family back home' in first place as the reason for using social media on holiday. This activity received high levels of agreement amongst those in South Korea, but it wasn't at the top of the list
- At the other end of the scale all markets ranked 'sharing their own advice and recommendations' as the less likely use of social media on holiday. There was less uniform agreement across the markets for other social media activities, which are explored in the next couple of slides

Use of social media on holiday: Germany

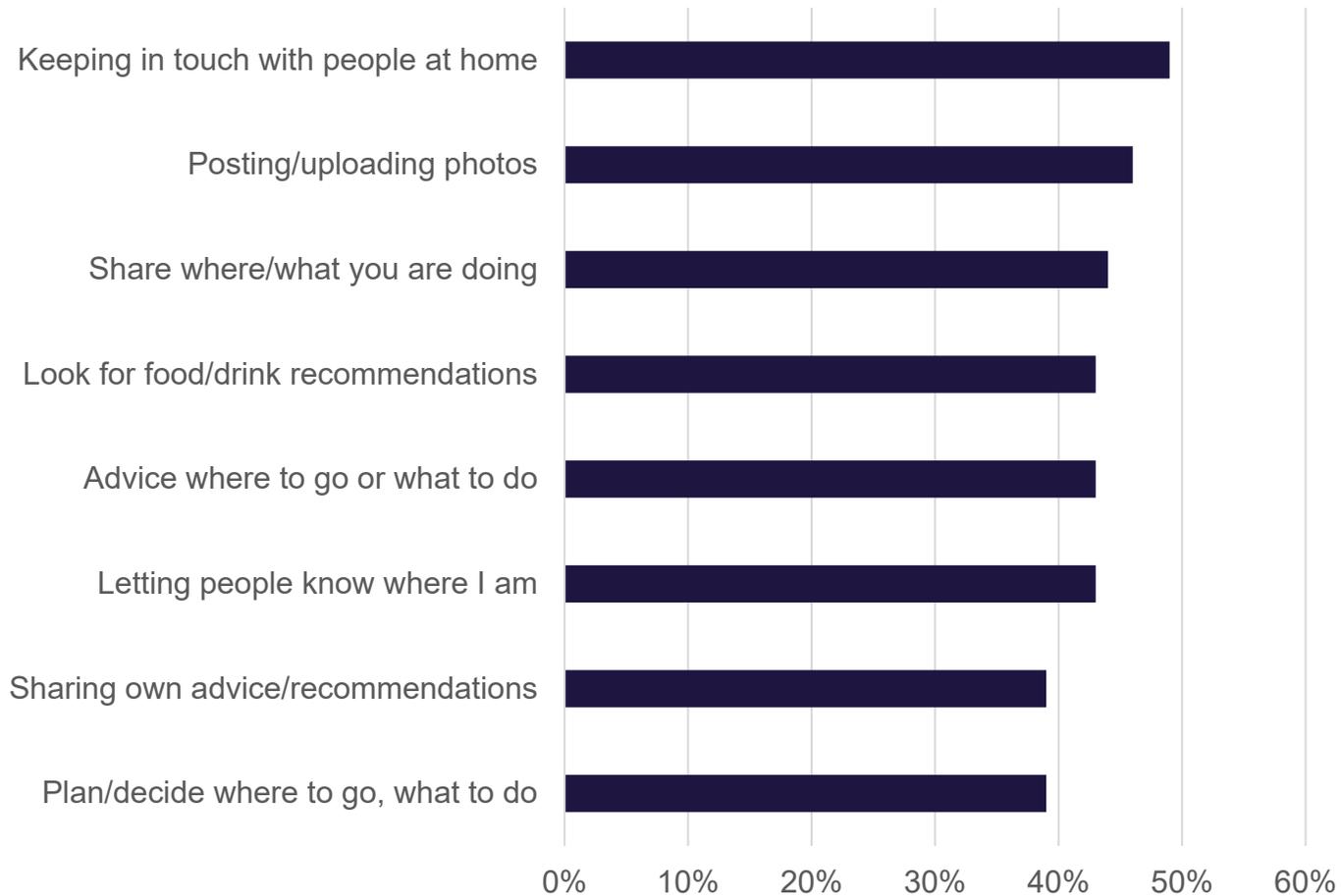
Use of social media on holiday (Germany)



- In Germany, 61% of the respondents said they had used social media when on a foreign holiday
- Behind keeping in touch with those still at home, Germans were most likely to use social media to upload holiday snaps
- Two out of seven (29%) said they had used social media to look for food and drink recommendations on holiday
- Posting their own advice/recommendation for other users was the least likely use of social media on holiday by Germans

Use of social media on holiday: India

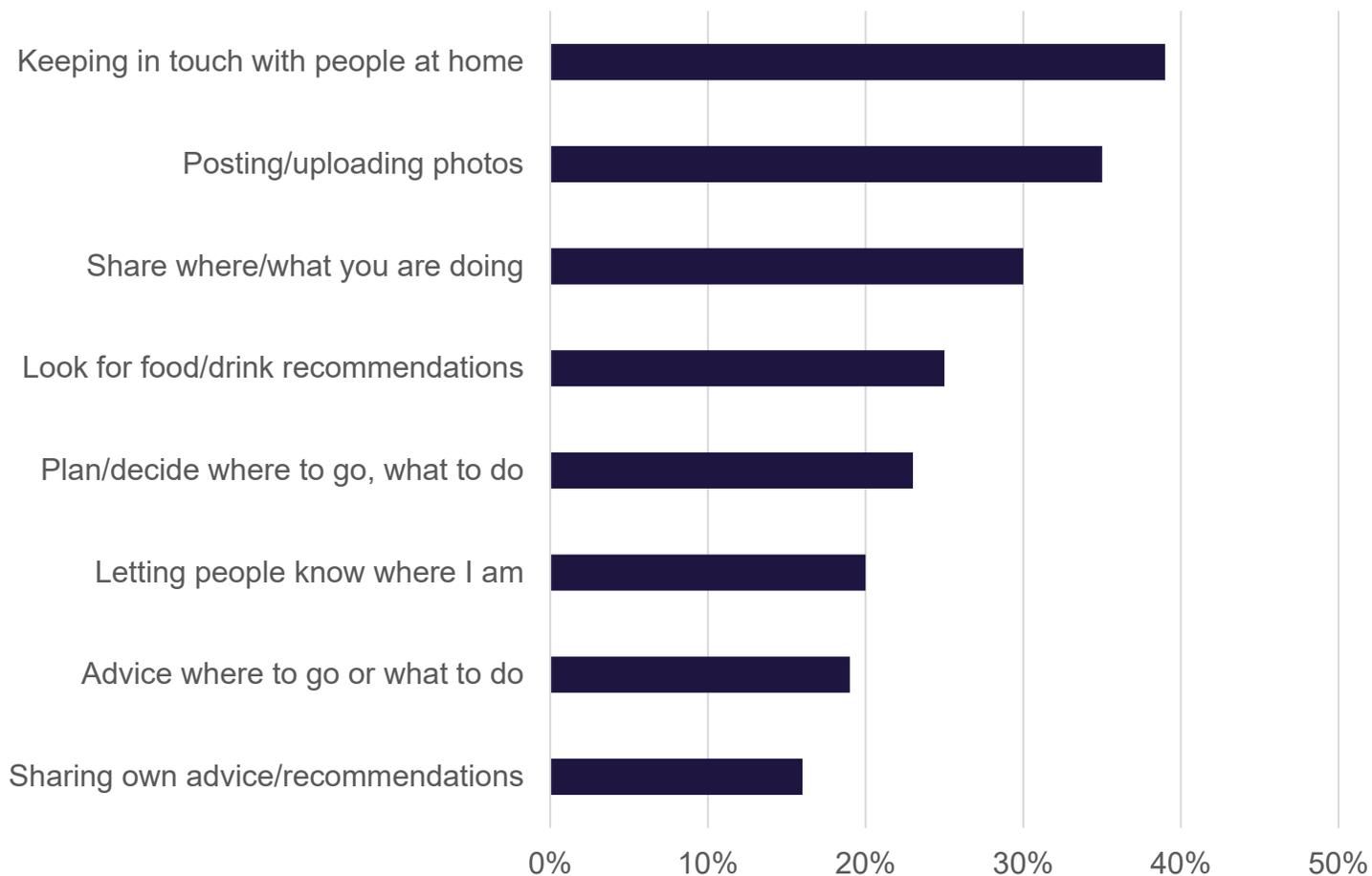
Use of social media on holiday (India)



- Respondents in India tended to show high levels of social media use while on a foreign holiday across all of the social media activity explored and agree with their counterparts in the USA, Germany and South Korea on what tops the list (keeping in touch with friends and family back home)
- As well as with keeping in touch with those at home (49%) and posting photos (46%), Indian respondents used social media on holiday to share what they were doing (44%) and letting people know where they were (43%)
- Next to sharing advice and recommendations, using social media to plan and decide where to go had the lowest use amongst Indian holiday-makers; although close to two out of five did use social media in this way (39%)

Use of social media on holiday: USA

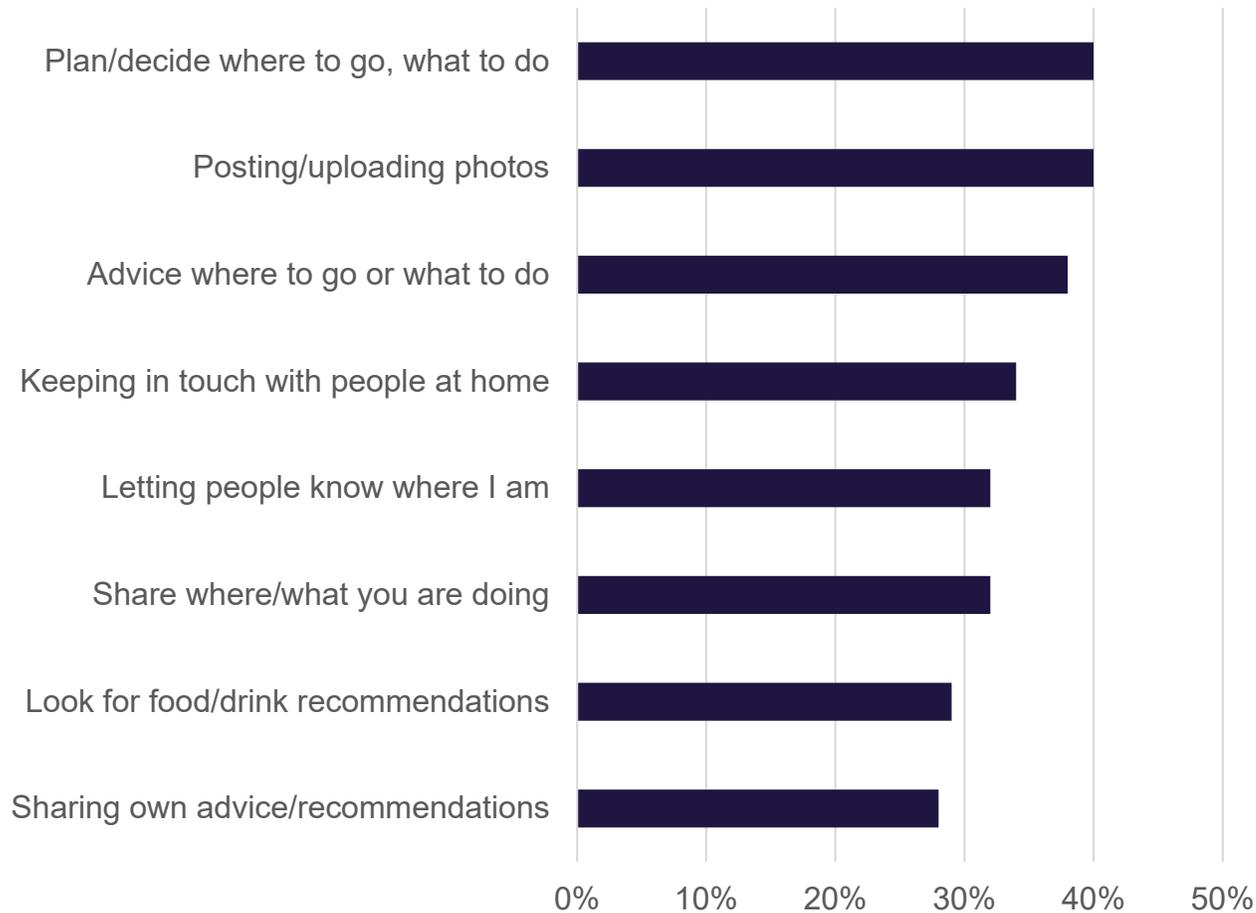
Use of social media on holiday (USA)



- After keeping in touch with people at home (39%), respondents from the USA were next likely to have used social media on holiday to upload pictures (35%), followed by sharing details on what they were up to on holiday (30%)
- Receiving the lowest levels of agreement amongst those from the USA, alongside sharing own advice and recommendations (16%), was giving advice to fellow travellers (19%) and letting people know where they are (20%)
- The USA is the least likely of all the markets in this survey to share advice/recommendations (16% said they did) which is also the lowest proportion of any task across all markets

Use of social media on holiday: South Korea

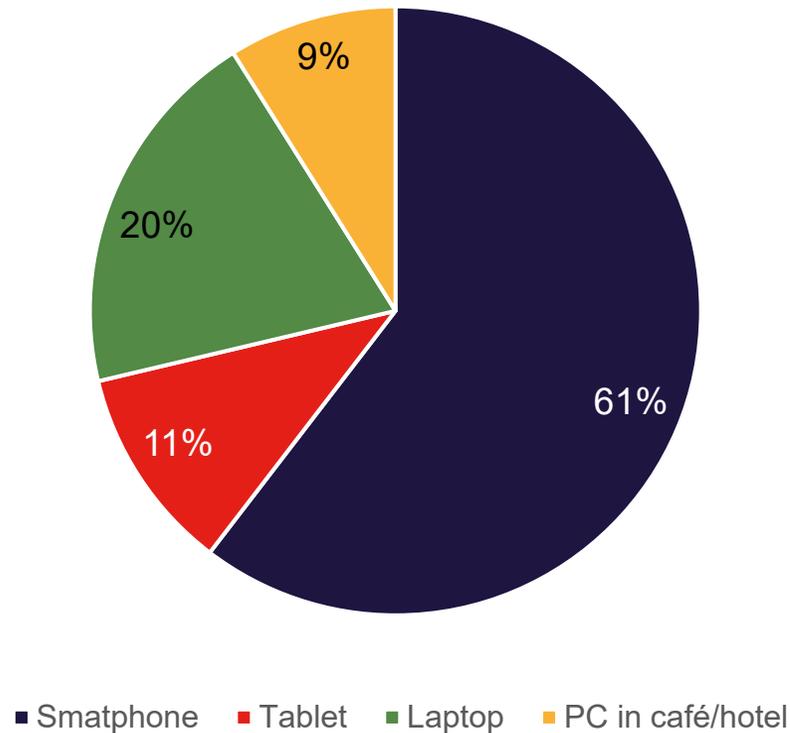
Use of social media on holiday (South Korea)



- Those in South Korea showed the highest likelihood to use social media when planning a foreign holiday (and the highest proportion across all markets); this was on par with posting and uploading photos (40%)
- South Korean respondents ranked asking for advice on things to see and do and where to go in third place - the highest place for using social media in this way on a foreign holiday, compared to the other three markets
- Looking for recommendations on food and drink were at the lower end of social media use here – although almost a third did use social on a foreign holiday for food and drink recommendations

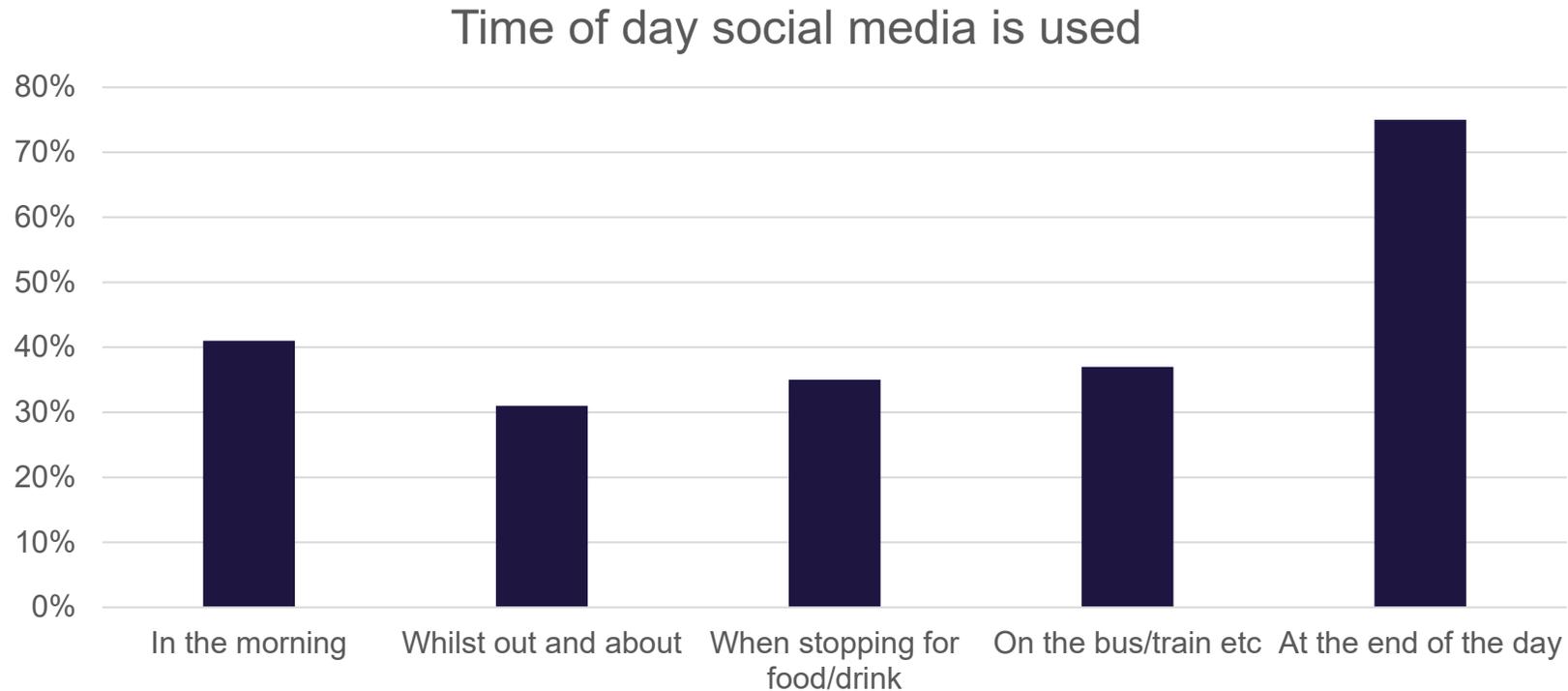
Devices used to access social media on holiday

Devices used to access social media



- Two thirds of respondents indicated they had previously taken a device on holiday that allowed them to connect with social media (77%) - these included smartphones, tablets and laptops
- Of those who indicated they had used social media on a foreign holiday the majority had used a smartphone to access social media – around 3 out of 5, with 20% saying they were most likely to have used a laptop to access social media
- Related to the devices used to access social media it is vital that all content and links (both internal and external) perform across all platforms. 64% of the respondents in this study said they would leave a site straightaway if a link did not work properly. This was particularly strong amongst those from the USA and South Korea where 67% and 70% respectively agreed they would leave a social media site if a link did not work. When creating social media content or linking to an external source, it pays to check across multiple platforms to ensure they perform as designed

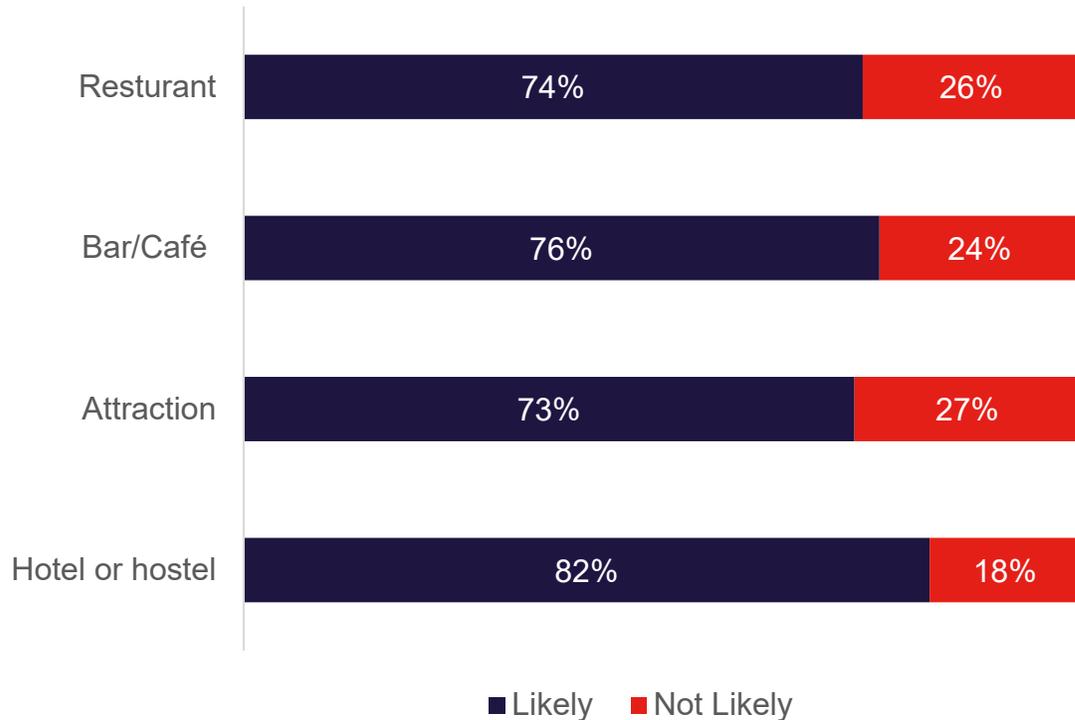
Time of day social media is used



- Across all of the markets in this study, the majority of those who used social media on holiday did so at the end of the day, back at their accommodation – 75% said they had used social at this time. The morning was the next most popular time, with 41% using it in the morning before starting the day. By comparison, fewer used social media whilst out and about either at an attraction, travelling between attractions or in the down time around eating (31%, 37% and 35% respectively)

The role of Wi-Fi

Likelihood to choose venues if they offered free Wi-Fi



- Essential to using social media is being able to connect to the internet, with many devices now relying on access to the internet to perform all of the tasks we have come to expect them to
- In terms of encouraging use of social media on holiday, 44% agreed that information and details on where and how to access free and secure Wi-Fi would help. This suggests consideration should be made to ensuring visitors are able to 'get online'
- 82% of the respondents said free Wi-Fi access would encourage them to choose a particular hotel or hostel, while 76% said free Wi-Fi when stopping for a tea / coffee or to have a drink would encourage them select a particular bar or café. Similar proportions agreed Wi-Fi access would influence a decision to eat at a restaurant or visit a particular attraction (74% and 73%) respectively

Content to inspire (1/2)

- During the qualitative stages of this project, the agency explored ideas for social media that would most likely resonate with respondents and were considered engaging and inspiring. They found a number of points that should be considered in terms of images and also tested some content ideas.
- Images have the ability to instantly connect with a user. As such there were a few suggested guidelines when it comes to posting images on social media to appeal to potential visitors:
 - Images should feel real and authentic, avoid photo-shopped images and (where possible) there should be a mixture of both professional and a real traveller's perspective
 - try to select an image that promises a genuine experience
 - unique and thought-provoking images should work well, with a promise of an immersive and memorable experience
 - images that feature fellow travellers can spark imagination, provoke daydreaming and bragging rights
- For accompanying text; interesting nuggets of 'insider' information such as did you know and discover with directional end text and a link should work well. It is always important to avoid assuming a reader knows a lot of history and context behind a post – if too much is assumed or it is too wordy the piece will become lost with the user

Content to inspire (2/2)

	Appealing	Somewhat Appealing	Not Appealing
Good places to eat British food	77%	18%	5%
Itineraries with different themes e.g. food & drink, film locations, outdoor activities, castles & palaces etc.	75%	19%	6%
Notified of events happening nearby	72%	22%	6%
Calendar of key events & festivals	72%	22%	6%
Itineraries for holidays of 2/3 days, a week etc.	71%	23%	6%
Map of most and least visited destinations	71%	23%	6%
Ideas of what to do within 1/2/3 hours travel time	68%	24%	7%
Reviews by people from your own country	68%	24%	7%
Ability to post a question for a reply within 24 hours	65%	27%	7%
YouTube videos about holidaying in Britain	59%	29%	12%
Content based on what your friends are searching for	58%	31%	11%
Good places to eat food from own country	58%	26%	16%
Top 10 useful mobile apps	57%	30%	14%
English language YouTube videos	51%	30%	18%
Information on things to do with children	49%	29%	22%
Prize for selfie photo	43%	31%	26%
Tweet or post your location to entry prize draw	42%	32%	26%
Competitions	37%	34%	29%

- A number of ideas in terms of content were also tested. These were ideas generated during the qualitative phase of the project that consulted with both industry and social media experts, VisitBritain's social media team and consumer focus groups. In general, ideas that provided holiday inspiration or ideas on what to do on holiday tested as most appealing.
- Content on social media that most appeals to respondents are: good places to eat British food (77%), itineraries with different themes (75%), notified of events happening nearby (72%) and calendar of key events and festivals (72%)
- On the other end of the scale, content that appeals less strongly to users include: prize for selfie photo (43%), tweet/post a location for a prize draw (42%) and competitions (37%)
- This highlights that content should be more informative as opposed to asking the user to perform an action e.g. upload photos for a prize draw

Methodology

- To explore the role of social media in the context of holidays VisitBritain commissioned a bespoke study with HPI Research during 2014. The research sought the views of current social media users and from both visitors and considerers, defined as follows:
- Visitors must have previously visited Britain for a holiday/vacation of at least 2 nights in the past 5 years
- Considerers were respondents who had not yet visited Britain, but are considering doing so at some stage in the future
- The research project explored the role of social media in four markets - USA, Germany, India and South Korea. Fieldwork was completed in May 2015. The project talked to consumers in market, in qualitative groups followed by a quantitative study of 1,663 respondents

Market	Sample
South Korea	414
India	407
Germany	418
USA	424

Role of social media in the context of holidays

Foresight – issue 142