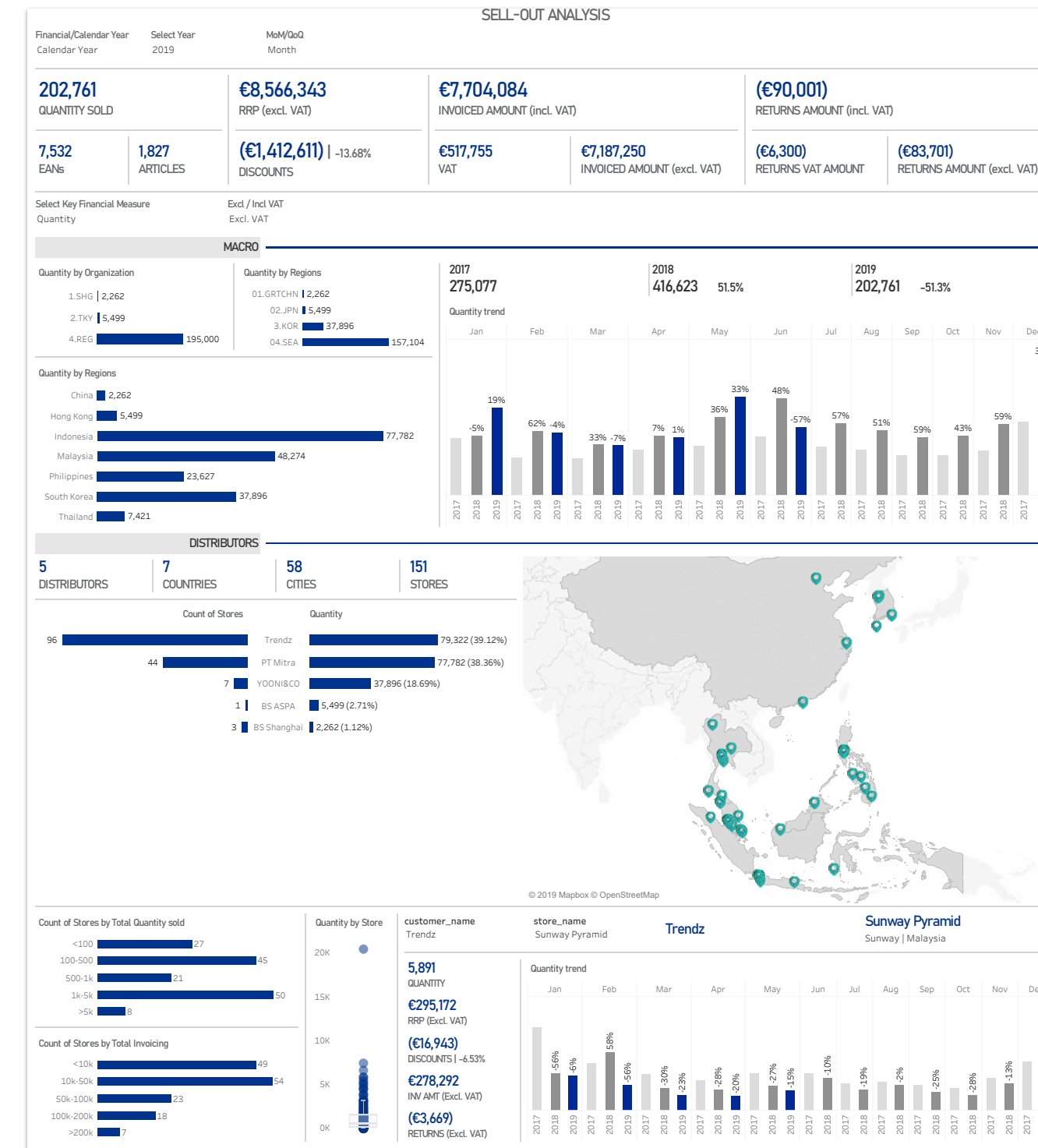
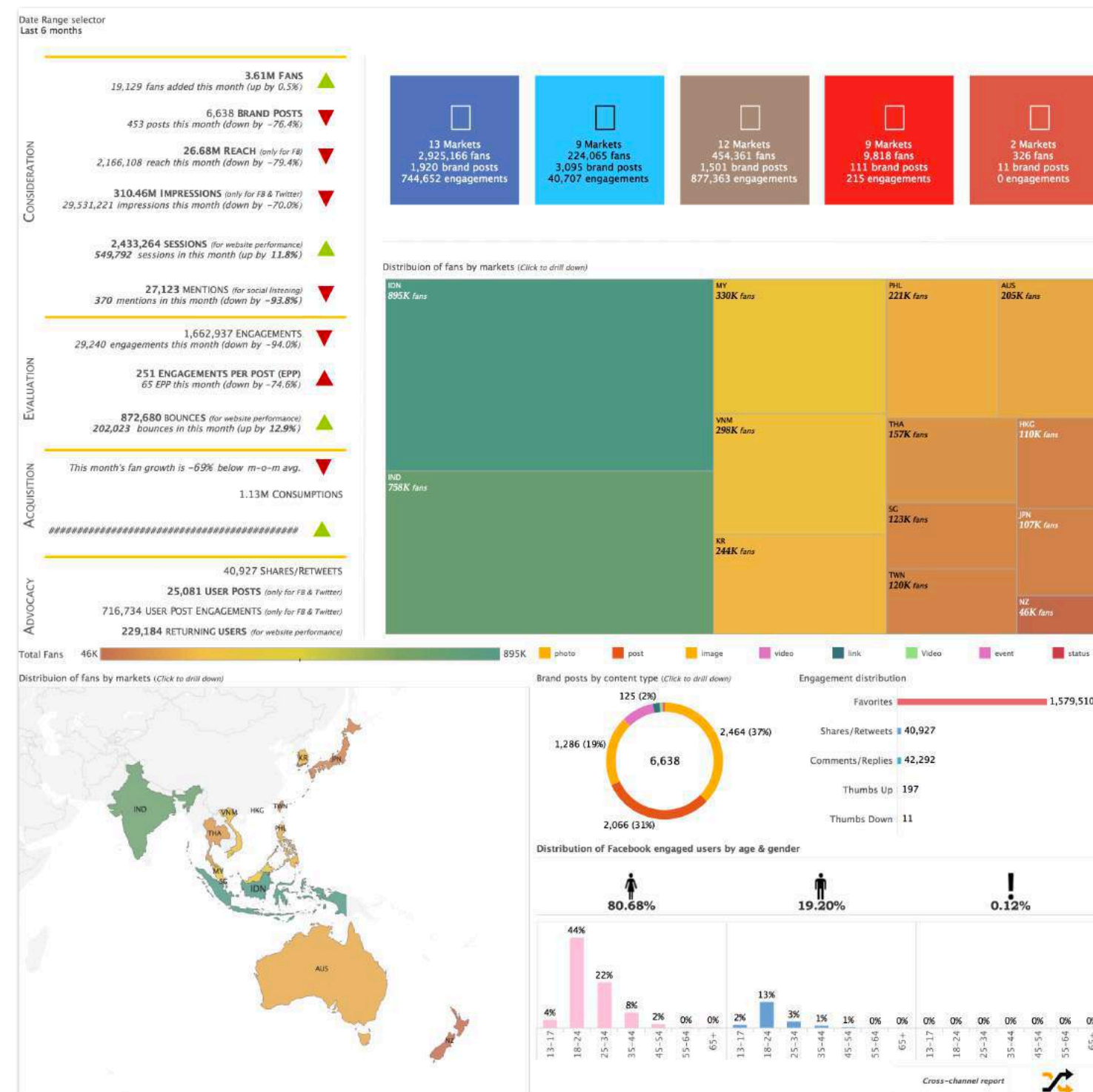




2019

LUXURY HOTELS - GLOBAL SOCIAL MEDIA REPORT



DATA VISUALIZATION AND DASHBOARDS

Totem works with a range of brands globally on business intelligence solutions.

Our clients range across industries; from retail/fashion to beauty, from travel to finance.

Business intelligence and data visualization projects for our clients address critical issues including; sales performance, marketing ROI, and social media optimization.

www.talktototem.com



2019 LUXURY HOTELS

GLOBAL REPORT ON SOCIAL MEDIA PERFORMANCE



ABOUT THIS REPORT

Totem Media recently concluded a broad ranging research project to understand social media practices for luxury hotels on Facebook and Instagram globally.

The study covered six months - *from Jan-Jun 2019* - with content across five global cities; New York, Hong Kong, Tokyo, Sydney and London. For each city, we evaluated five leading properties; three properties in each city, with a mix of global hotel brands and well-know independent (boutique) properties. Our aim with this project was to un-cover best practices on a city-by-city basis and to reveal wider trends between and across geographies.

These findings are combined with up-to-date research and insights from other sources on leading practices for luxury hotels on social media.



THE RESEARCH

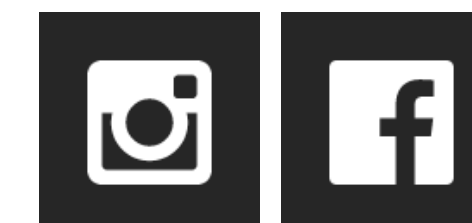
In June 2019, Totem completed a wide ranging research study of hotel social media performance globally - evaluating 4,000 individual posts from hotels in five global centres; New York, Hong Kong, Tokyo, Sydney and London.



THE RESEARCH

Posts were tagged, grouped by theme and analyzed for relative performance (Globally) on Instagram and Facebook.

10 Themes were identified for sorting (tagging of posts). Posts were also tagged based on a variety of other criteria ...to get to clear on 'what really works on social media for hotels.'



Data tabulation provided by: Syvylyze



DASHBOARD

All of the data from the research was compiled and visualized (featured here, using Tableau).

Visualizing data allows for depth and clarity on what's really happening by channel (Facebook vs Instagram), by city, by hotel, by time, format, theme...etc.

The data has been analyzed to reveal an multitude of important insights covered in this report.

Data tabulation provided by: Syvylyze



WHY SOCIAL MATTERS

THE IMPORTANCE OF SOCIAL MEDIA FOR TRAVEL AND HOSPITALITY BRANDS.



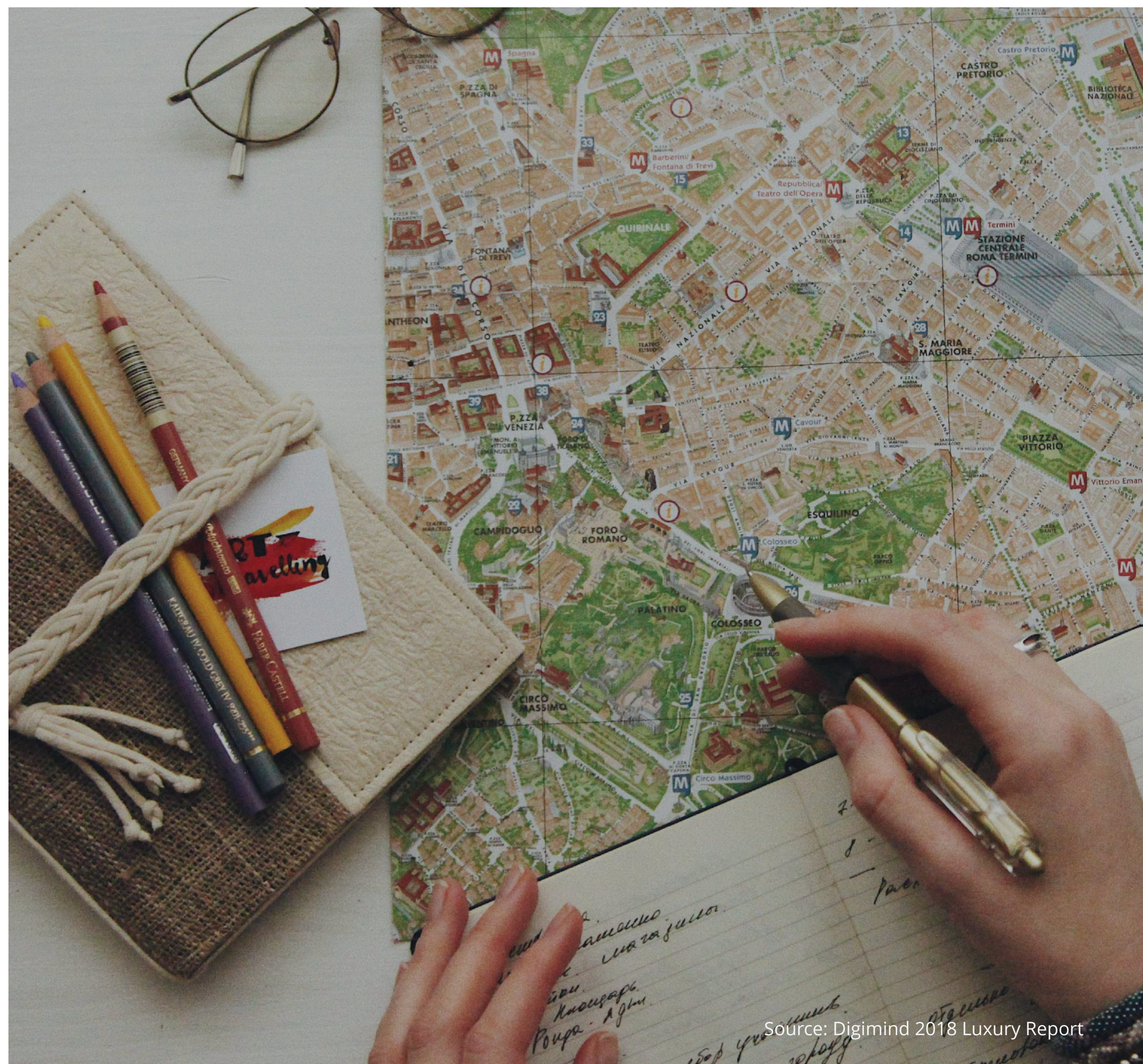


Social Matters in Travel Marketing

KLM has publicly shared that every €1 investment in social media earns the airline €1.2 in direct revenue and €1.8 in indirect revenue. That's an ROI of 3X.

52%

Of travelers like or follow a page related to an upcoming trip after they book





Source: Digimind 2018 Luxury Report

74%

Of millennials
share photos to
social media while
traveling

97%

Of travelers use
social media while
on vacation.



BY THE NUMBERS

Why social media is critical for travel marketing

46%

Of travelers are active on Instagram, a 350% increase since 2013 **& 60% of millennial travelers use the platform.**

Source: Marketing Dive

62%

Of those surveyed (globally), use social media posts from friends and family to research leisure trips.

Source: Accenture & Facebook IQ, 2018, Travelport, 2018

72%

Of Chinese travelers are influenced by digital media, such as social media platforms and social trip planning platforms, while planning their overseas trips.

Source: Fung Global Retail



Luxury Hotel's Are Playing Catch-up.

Within the luxury space, hospitality brands lag behind leaders (eg. fashion & auto) when it comes to social media. In a ranking of 100 brands, only two hospitality brands (Four Seasons Hotels and Resorts and The Ritz-Carlton) ranked among the top 50 luxury brands on social.



GLOBAL SOCIAL RESEARCH



KEY LEARNINGS FROM OUR GLOBAL RESEARCH ON LUXURY HOTELS



Instagram is winning over Facebook as the key channel for hotel marketing ...especially for luxury brands who need to develop strong engagement.

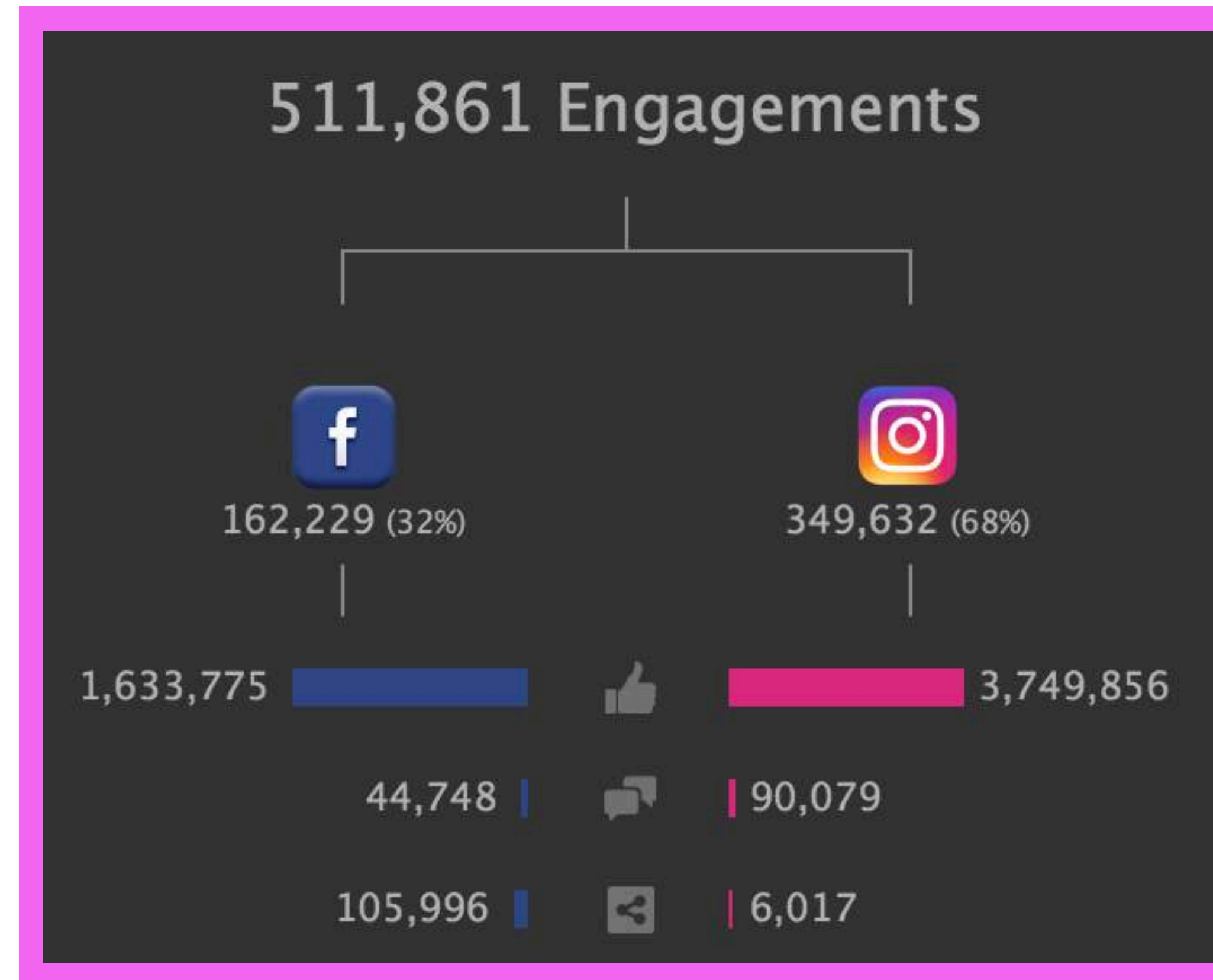
Instagram drives brand - consideration, affinity - which are the key factors when supporting luxury and travel sales.



68%

Summing up engagement across all properties/cities, Instagram accounted for two-thirds of all engagement. Instagram's engagement averages are 78.6% higher than those on Facebook.

Source: Totem 2019



INSTAGRAM FOR BRAND GROWTH

Our research of properties across all markets is consistent with other analyses of social media performance ... showing that Instagram drives the bulk of all audience engagement.

The success of Instagram for engagement makes it the critical tool for luxury hotel brands in building brand affinity, improving consideration and supporting long-term connections with patrons. The bulk of branding (image driven) efforts should go into Instagram.

Conversely, Facebook still leads when it comes to total reach and shares. Therefore, campaigns and promotions ... and tactical efforts should be centered around Facebook.

In a sense, Instagram takes the place of a brochure (or Web landing page), where Facebook is a line of communications, akin to email.

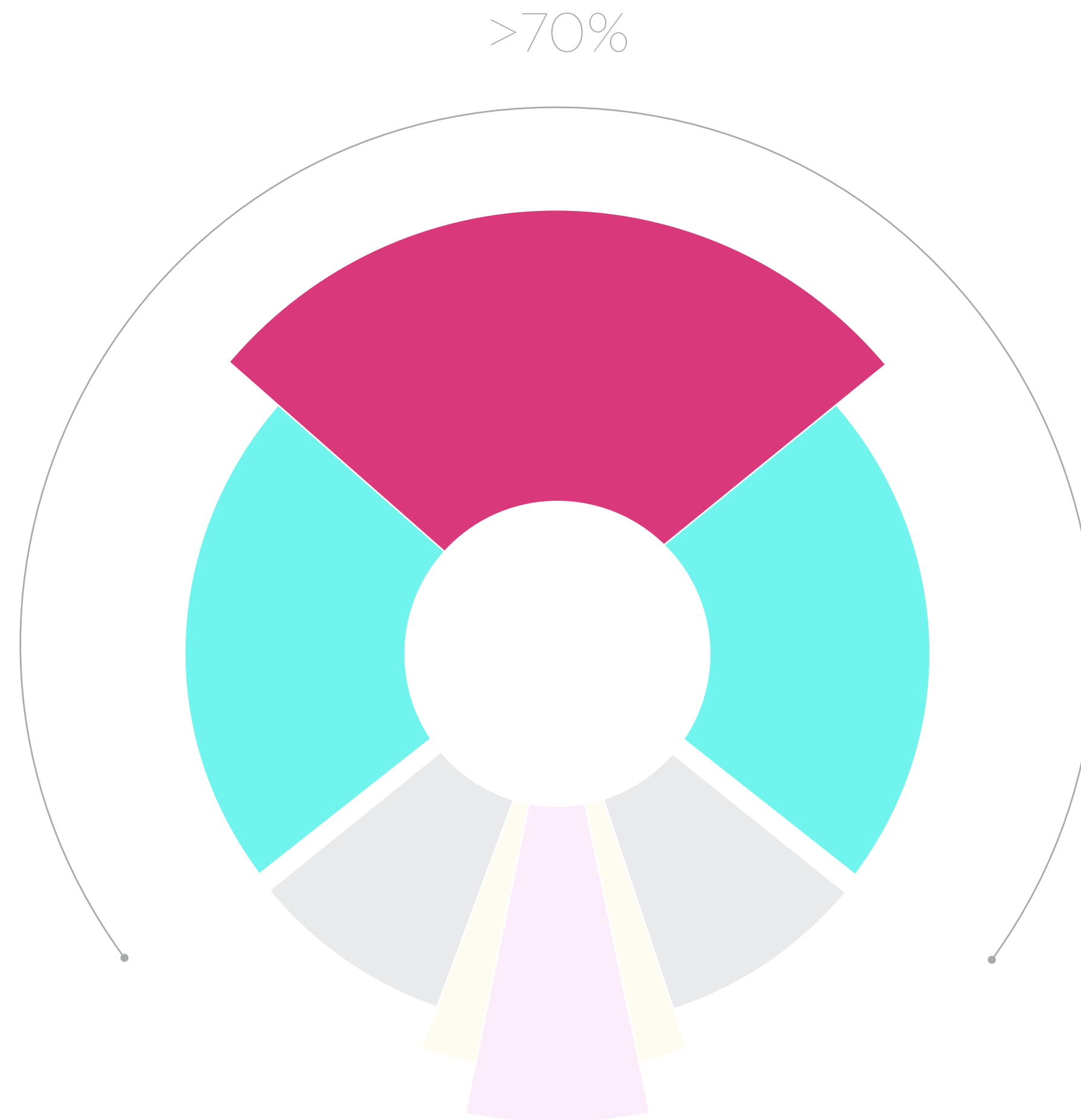
TOP OF FUNNEL

Themes/Topics that drive awareness/reach

Ideally two themes/topics which are designed to spark awareness with audiences.

These topics should address both (1)audience interests, and (2)brand identity.

- **Location x City**
- **Brand Identity**



CHANNEL



INSTAGRAM

Instagram should be focused on top-of-funnel and keeping feed clear of bottom -of-funnel content.

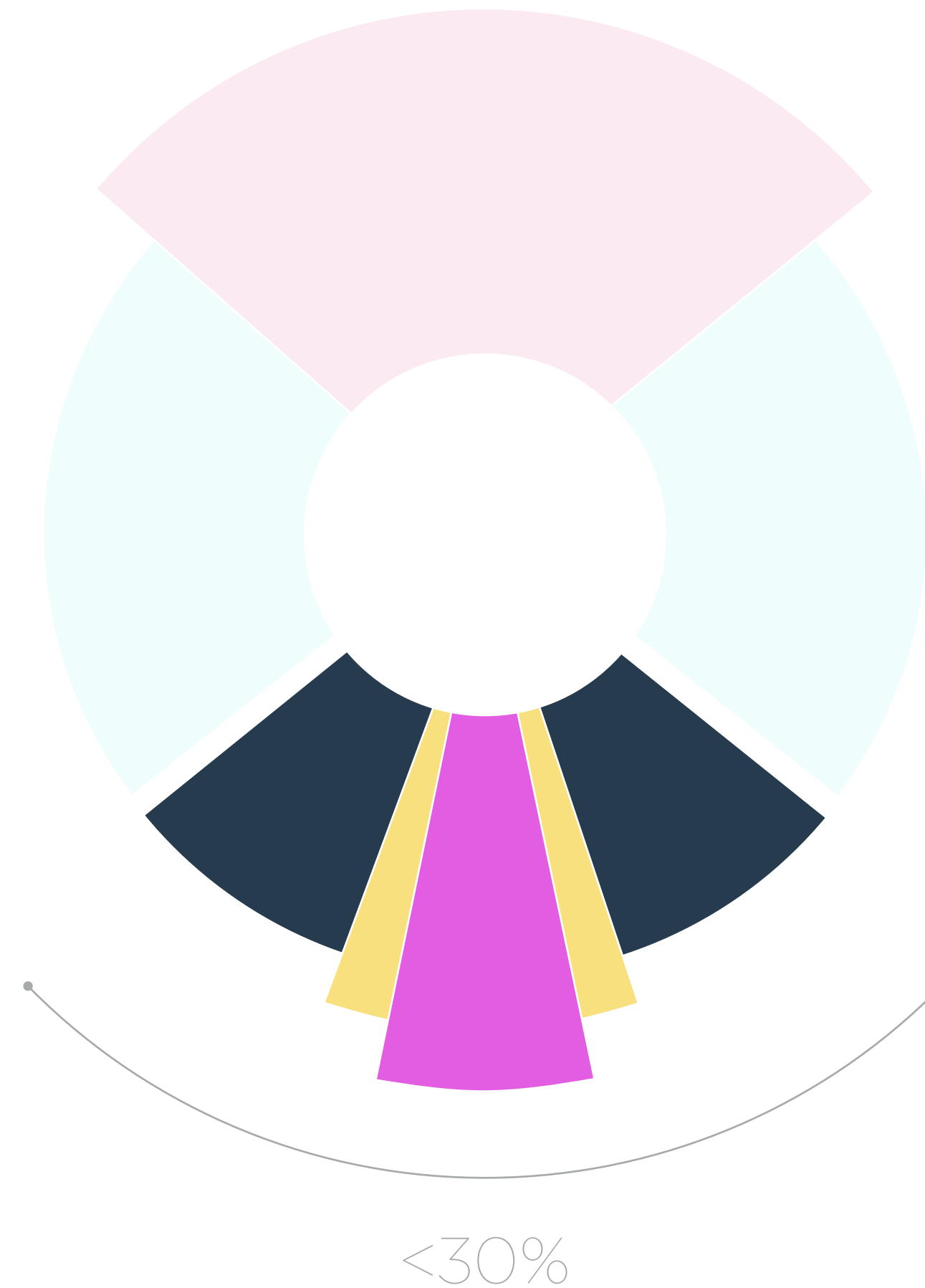
CONVERSION

Topics/themes with lead to action

Actions (outcomes) could be conversion to a sale/purchase ...but equally likely to yield engagement, an increase in consideration or a new enquiry.

Actions (outcomes) per brand and category are different.

- **Properties**
- **Rooms & Amenities**
- **Food & Drink**



CHANNEL



FACEBOOK

Facebook is the key channel for bottom-of-funnel contents. Promotions should be designed to share ...and supported with paid (boosted) ads.



93%

Of Consumer Engagement with Luxury Brands Happens on Instagram.

40%

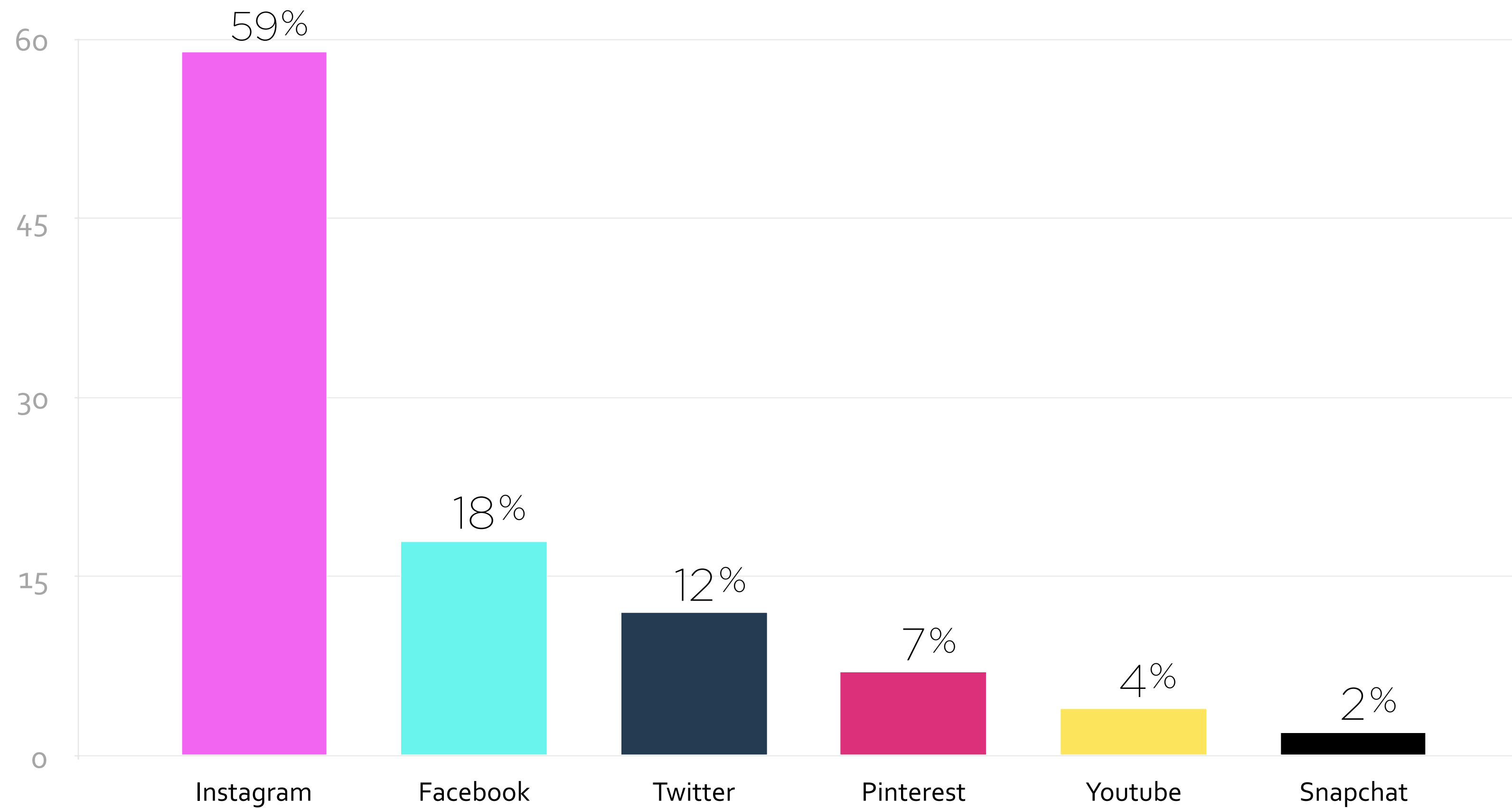
Of consumers under 30 prioritized booking a location based on how Instagrammable it is.



Source: We Are Marketing.com

INSTAGRAM FOR ENGAGEMENT

It's the clear cut leader among social channels



Which social media platform is the most effective for growing engagement?

In a survey of 2,500 social managers and influencers, Instagram ranks far-and-away as the most important channel for building engagement.

Instagram ranked 3x higher than Facebook in the survey.

The goal of all social media accounts is (should be) to implement and refine a winning formula. Audiences find good reason to follow when a 'winning formula' is in place.

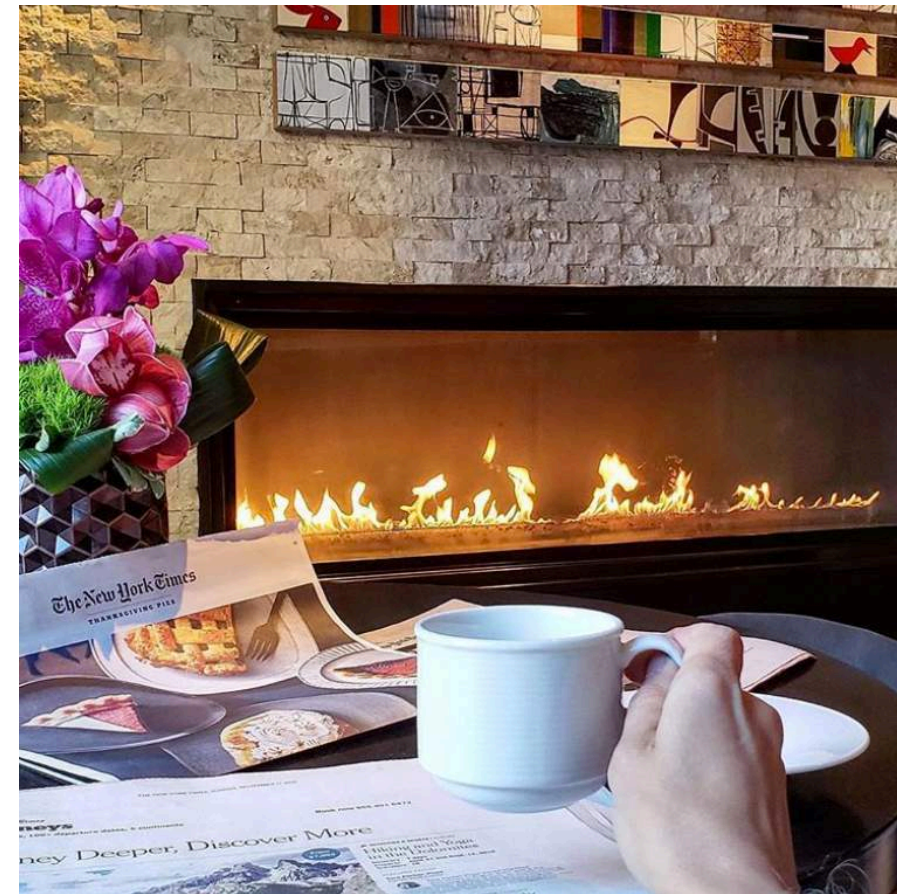
A 'winning formula' is composed of the themes/ topics and elements of design which make an account unique, special and worth precious audience time and attention.



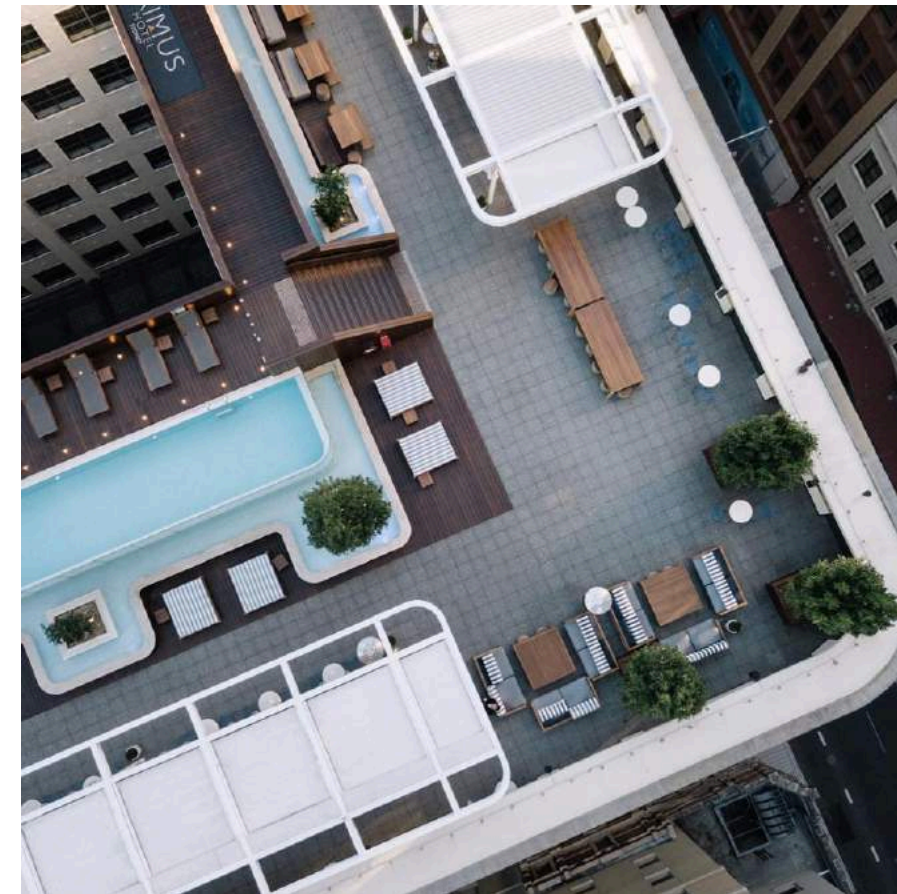
Food & Drink



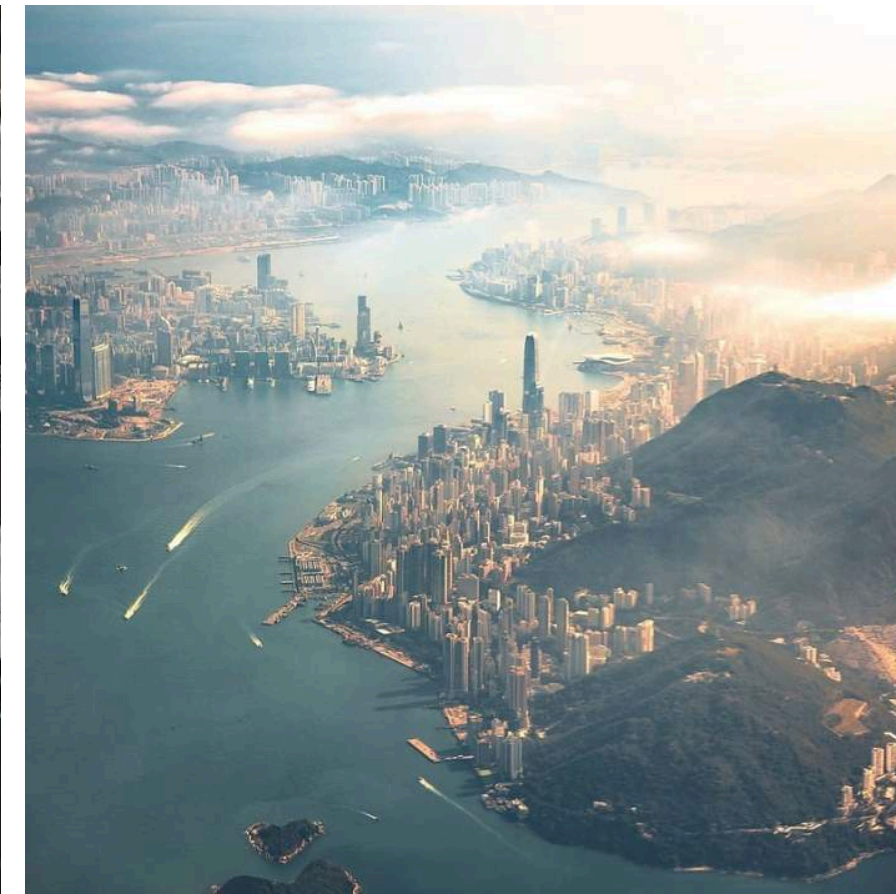
Hotel (Interior)



Hotel (Exterior)



City (Scenic)



City (Experience)



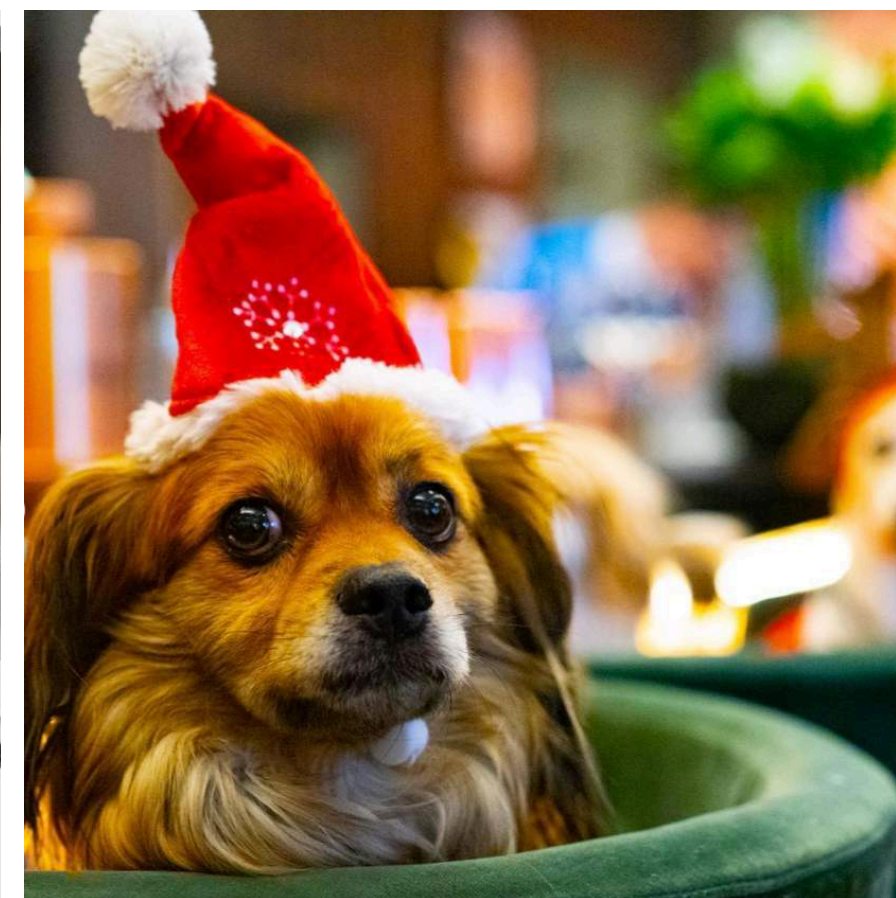
Guest Experience (No Face)



Guest Experience (Face)



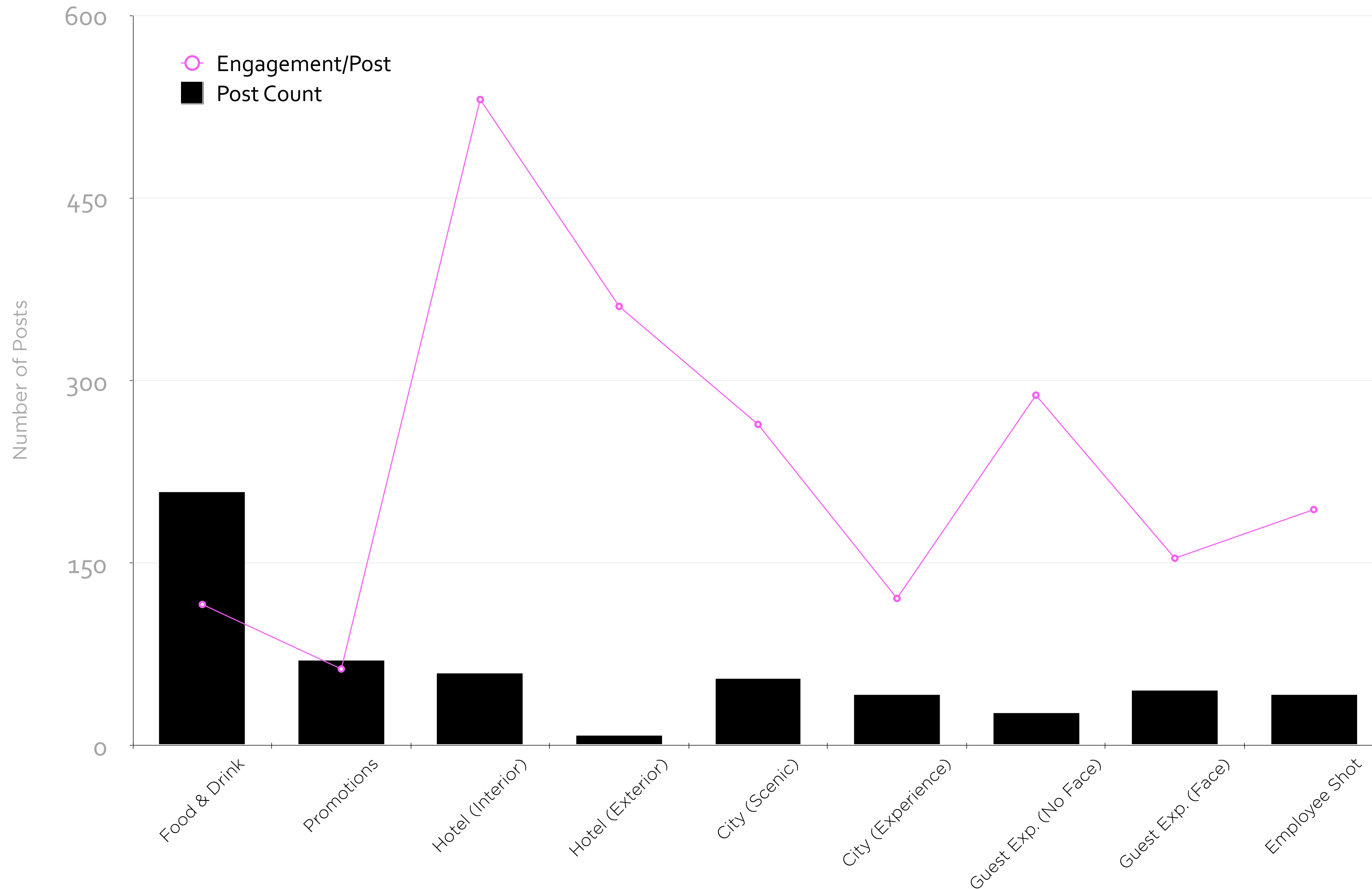
Employees



Festivals (Quotes)



Promotions



CONTENT THEMES

Top rated post themes/types across all cities are:

1. City Scenes
2. City Experiences
3. Hotel Interiors

The worst performing contents are:

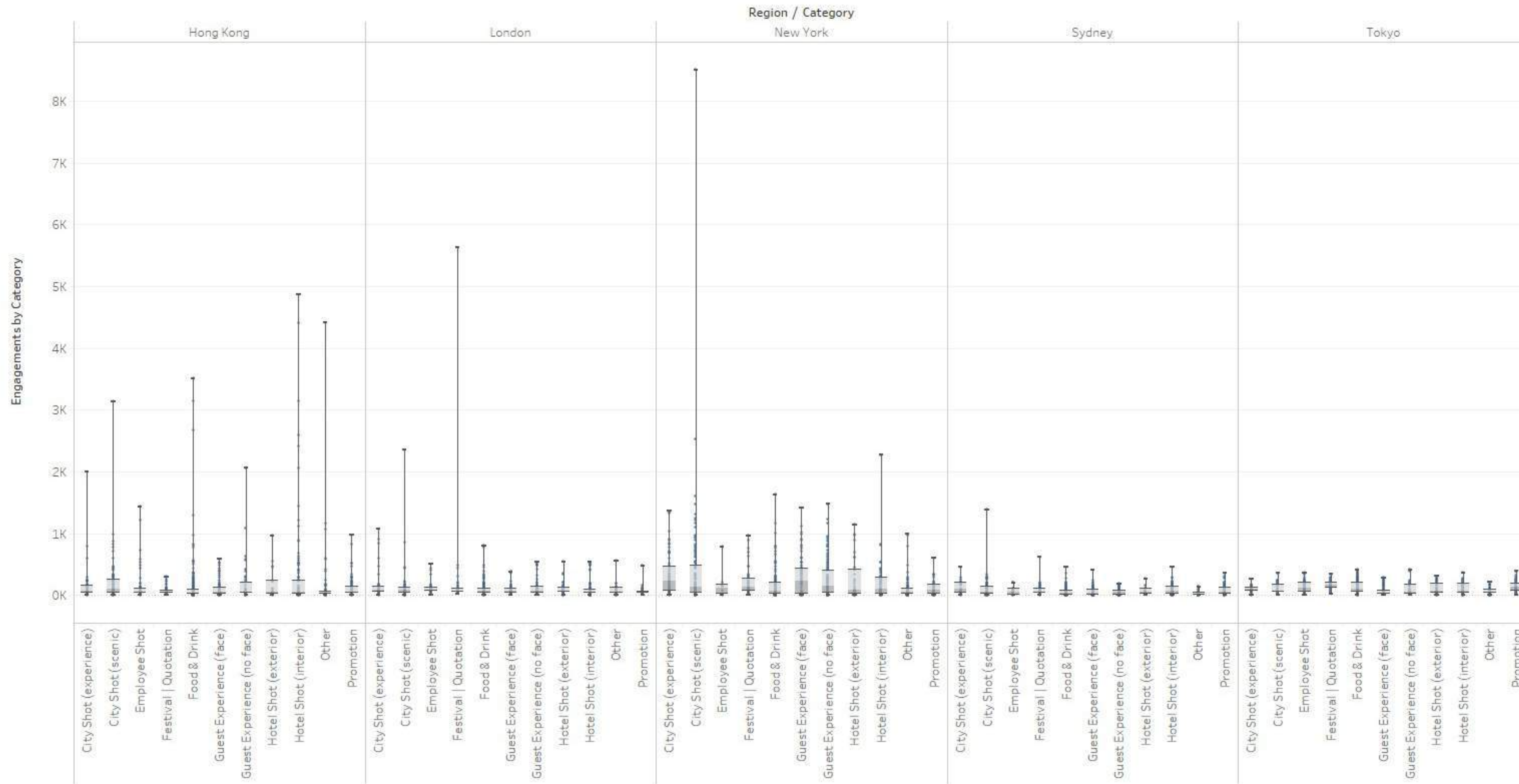
1. Promotions
2. Food & Beverage

F&B posts were the most common type/theme BUT the worst performing.

While F&B posts are important to drive local business revenue, they weigh down overall performance and become a drag on brand growth and engagement.

F&B posts should be reserved for use on Facebook and supported by robust paid (ads) boosting to achieve business goals.

Conversely, Instagram should be focused on Hotel Interior/Exterior and City Images ...with very few F&B images.



WINNING FORMULAS?

Most properties use a cookie cutter approach to social media, with little-to-no differentiation in strategies and content themes. This is true across all cities covered in the research.

The rare 'high engagement' posts from the properties surveyed generally came as the result of paid (boosting) support of the post.

There are opportunities in each market to step ahead of the competition with strategies which are; more focused, concentrated and remarkable. There are opportunities to concentrate more on a single content theme and/or to develop a completely new approach.

Omitting some themes and having fewer topics is a solid first step toward finding a 'winning formula.'

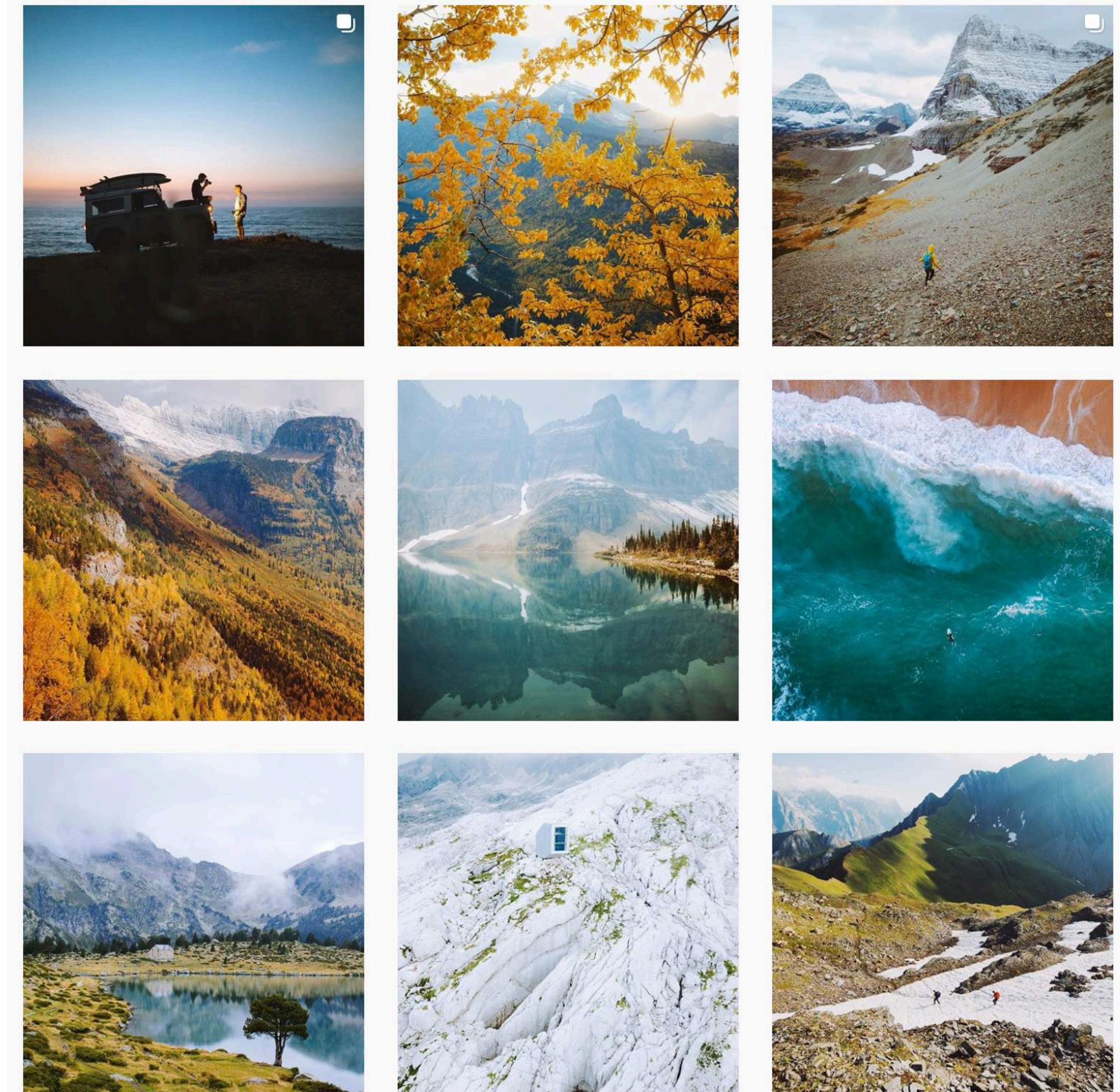
THIS IS A WINNING FORMULA

Inspiring images are the top priority on Instagram.

Brands that win on Instagram are meticulous about delivering great images, a well curated collection of content and a thoughtful grid design.

Success comes with locking in a clear, compelling formula. Great accounts understand the reason audiences follow and consistently delivering on this promise.

Great accounts are cohesive, inspiring and high-impact. Get this right, and there is little else that matters.



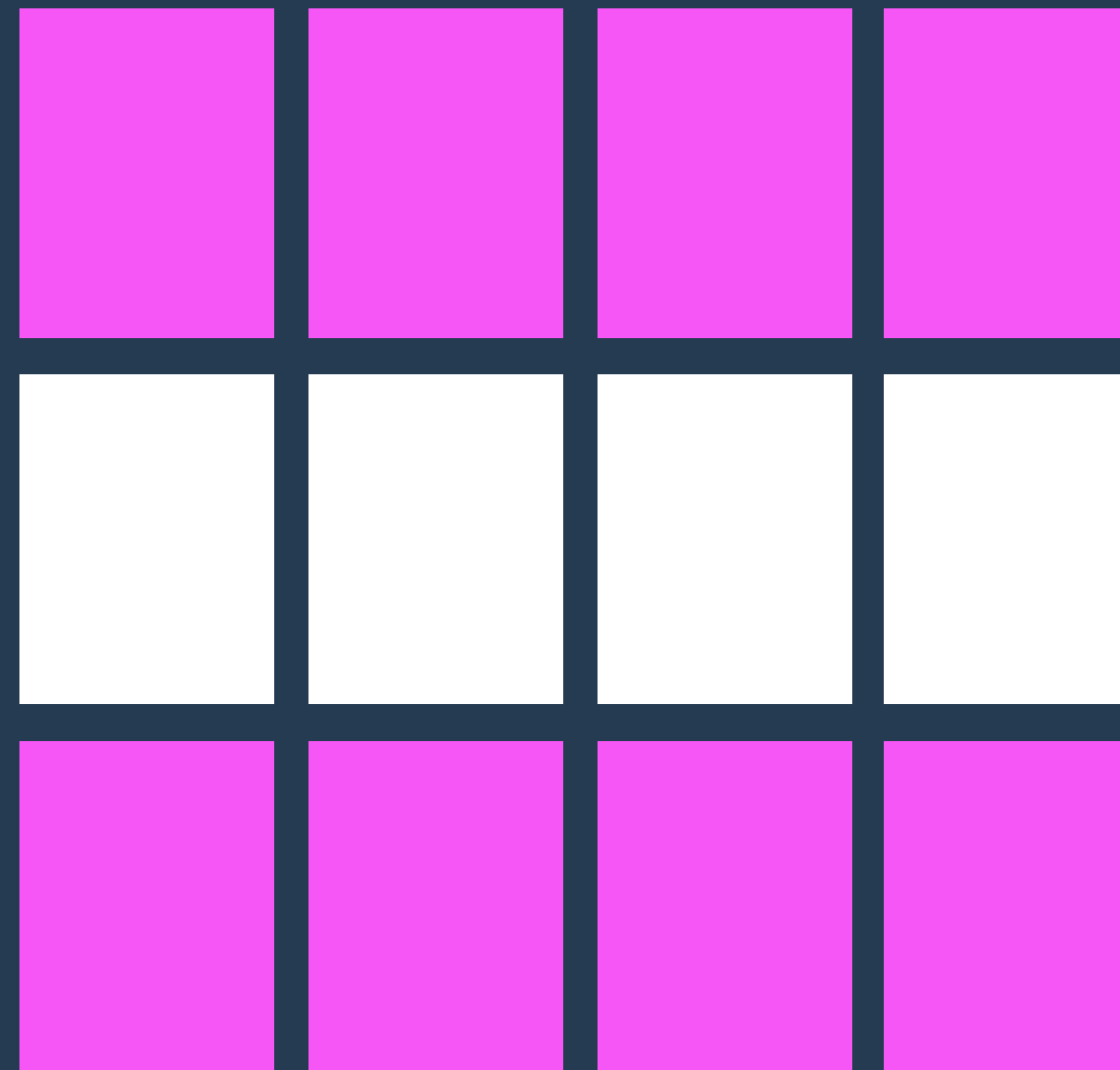


CONTENT ANALYSIS



Based on the contents reviewed and themes analyzed in the research, a number of specific ‘best practices’ emerged - answering the questions of what works best for hotel social accounts. For instance, most social accounts make the mistake of covering too many topics/themes, and never creating a focused ‘reason to follow.’ Successful social accounts find a ‘clear formula’ and then edit out anything that doesn’t support the formula. Every image that deviates from the ‘formula’ counts as a reason for audiences to not follow. Audiences look for evidence that an account is (1)unique and interesting, (2)consistent ...and likely to continue delivering against what attracted them in the first place.

GROUP SOCIAL POSTS INTO CLUSTERS, SCHEDULE IN THEMATIC BURSTS.



Clustering posts (of a similar theme/style/topic) and posting in quick succession, can yield a two-fold increase in fan growth/retention.

Audiences who are initially attracted to a brand account (based on a topic) are more likely to follow if they see groups of similar posts already present on the account.

Totem Media APAC Social Study 2018. (x. 80,000 social posts)

THEMATIC BURSTS, OF THE SAME THEME

Scheduling a group of posts - all fitting into a single theme - in close succession raises performance.

The person who is attracted to the account based on this single theme/style will 'follow,' if they see other images of the same theme/style.



TOO MANY AUDIENCES, TOO MANY THEMES

While there is an interest in creating broad, balanced content schedules and appealing to everyone ...its hard to hold attention of a single, target group with a plan that is too un-focused.

The person who looks at this account because they love cocktails isn't going to 'follow' because that interest isn't going to be satisfied with this account.





GLOBAL VS BOUTIQUE



Strategies which work for local, boutique properties do not work for larger (chain) brands - and visa versa. For instance, boutique properties can (should) aim to be more personality driven and demonstrate more uniqueness. Larger brands have a hard time scaling up 'personality' in an authentic way and therefore need to leverage the benefits of scale, quality, reliability and proximity. All properties are seen to benefit from posts which showcase images of the feature city.

CONTENT INSIGHTS

What works for hotel groups on social



Signature Features
...depicting unique brand assets



OR

Personality and the attitude of hotel x
guest experience. But hotel has to have
genuine and compelling personality



AND

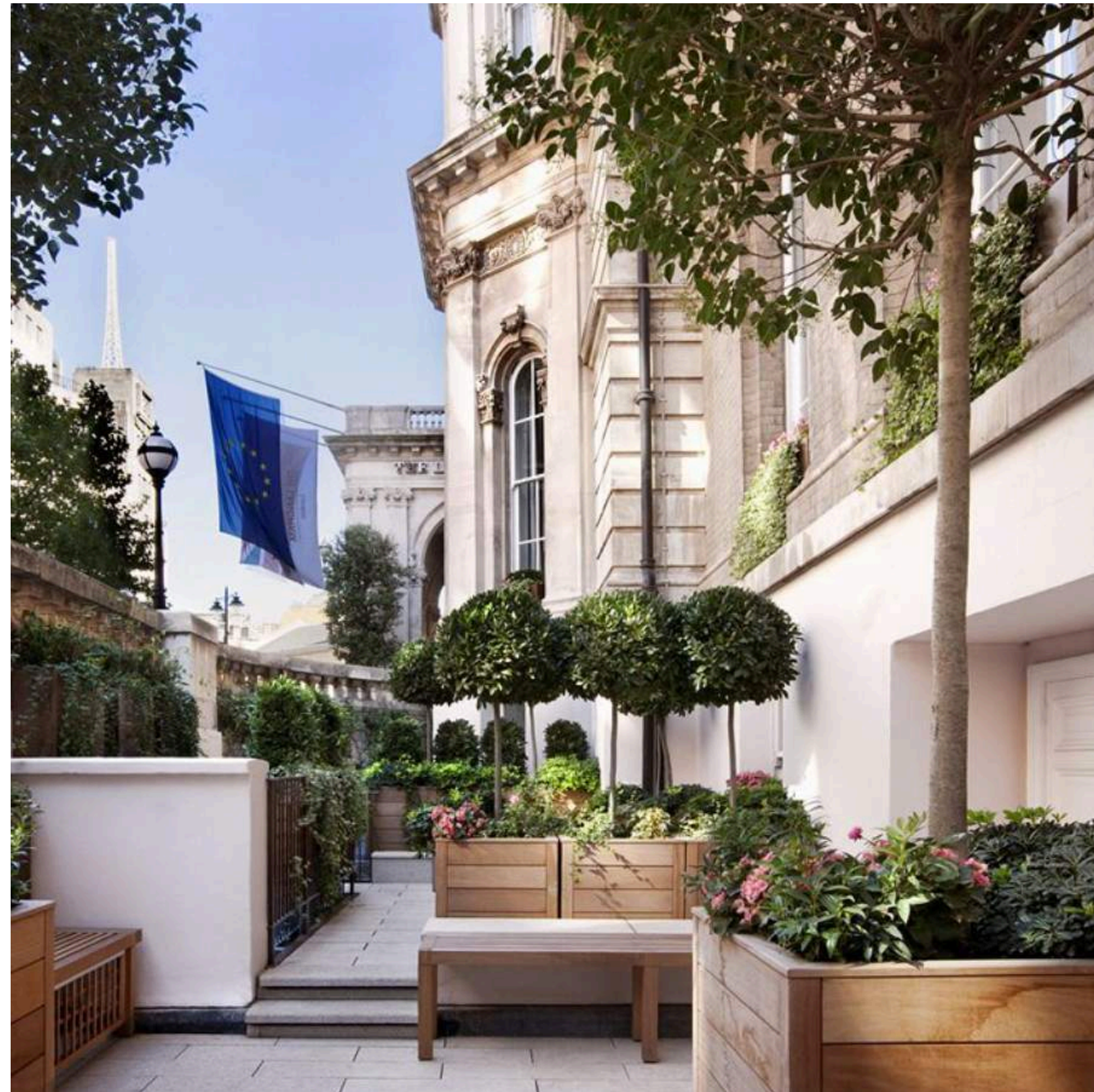
Passions (eg. Travel, activities) and
the cities themselves.

ESTABLISHING A FORMULA

*Highlight brand assets or personality
...lock in a 'formula'*

CONTENT INSIGHTS

What works for hotel groups on social



“Mystique” ...secrets and hidden opportunities to explore.



Audiences who are on the inside get it. Once the personality is clear, other associations all make sense.



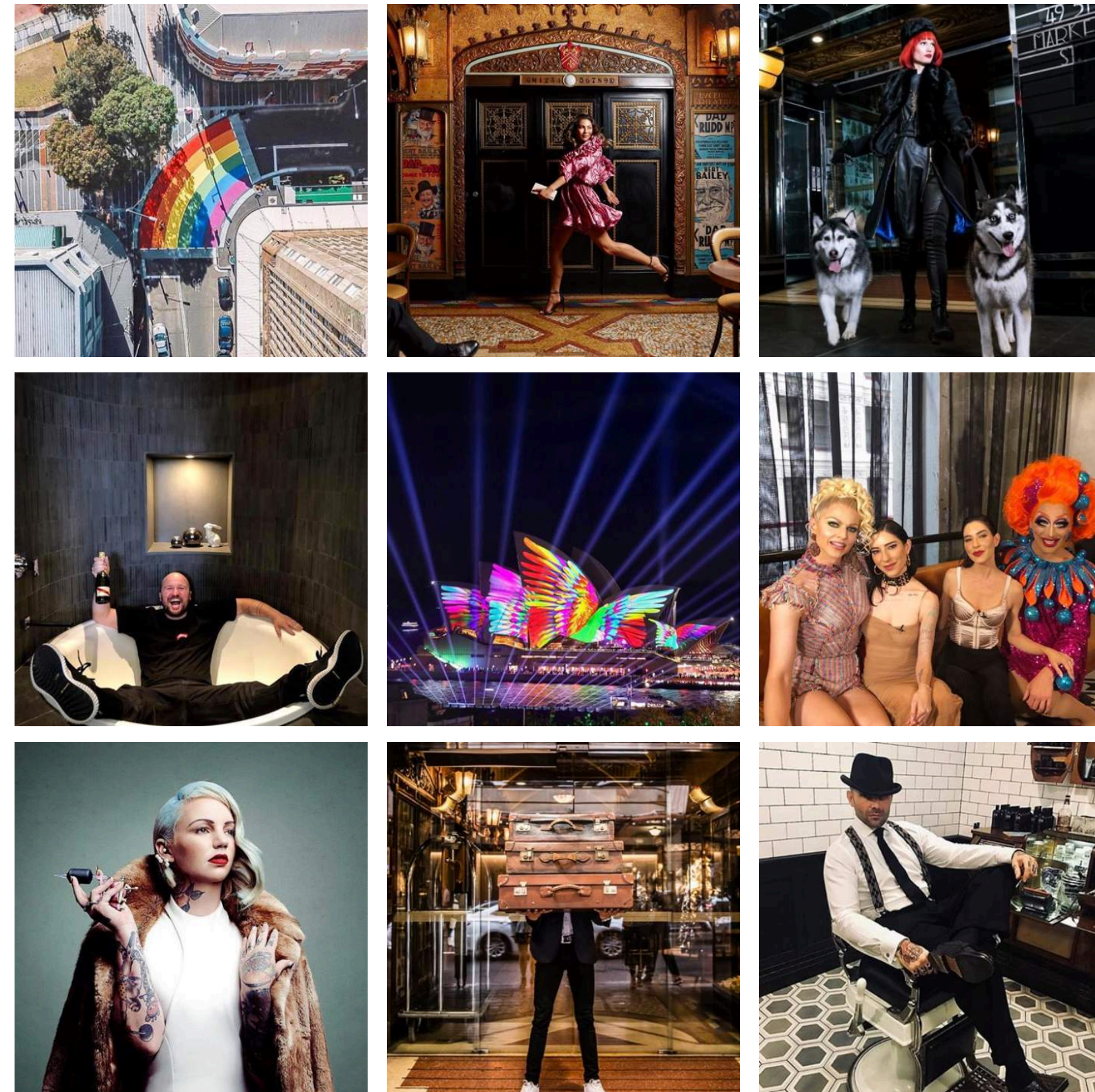
Going deeper ...revealing greater depth around key interests.

EXTENDING A FORMULA

Reward audiences with depth, secrets... connect to their reason for following

BOUTIQUES CAN BE MORE PERSONALITY DRIVEN

Boutique hotels often do a better job of finding and sticking with a clear, focused formula - for a more narrow audience, with fewer themes/topics ...and with a more unique visual style.



GROUP PROPERTIES RELY MORE ON BRAND ASSETS

Larger groups are necessarily less unique and find it challenging to maintain a 'personality' driven social media presence. The strengths of groups are in quality, reliability and ...the advantages of scale, location of properties.



ALL BENEFIT FROM IMAGES OF INSPIRING LOCATIONS

The reason people travel and romanticize travel are for the cities, resorts, and cultures of destinations.

Engagement on Instagram is most closely connected to these romantic ideals of travel.





INSIDE THE HOTEL



Images from outside (but nearby) the hotel perform better than images from inside the hotel - especially on Instagram. Images from the city (its scenes and experiences) perform well in top-of-funnel exercises. Images from inside the property are key to converting awareness and interest to bookings. The best performing images from inside the hotel are those which bring the experience to life authentically.

CONTENT INSIGHTS

What works for hotel groups on social



Corporate (sterile) images were overall worst performing on social channels. (Score = 1.8)



Demonstrating the experience of the hotel and the surrounding area score much higher (Score = 9.7)



Images from the city itself and points of interest near the property scored highest (Score = 16.2)

FOCUS ON EXPERIENCE

*Shifting away from features
...toward benefits.*

CONTENT INSIGHTS

What works for hotel groups on social



Images of people in rooms score low - especially when facing camera. (Score = 4.2)



Images of people in rooms score low - looking away from camera (anonymous) better (Score = 7.3)



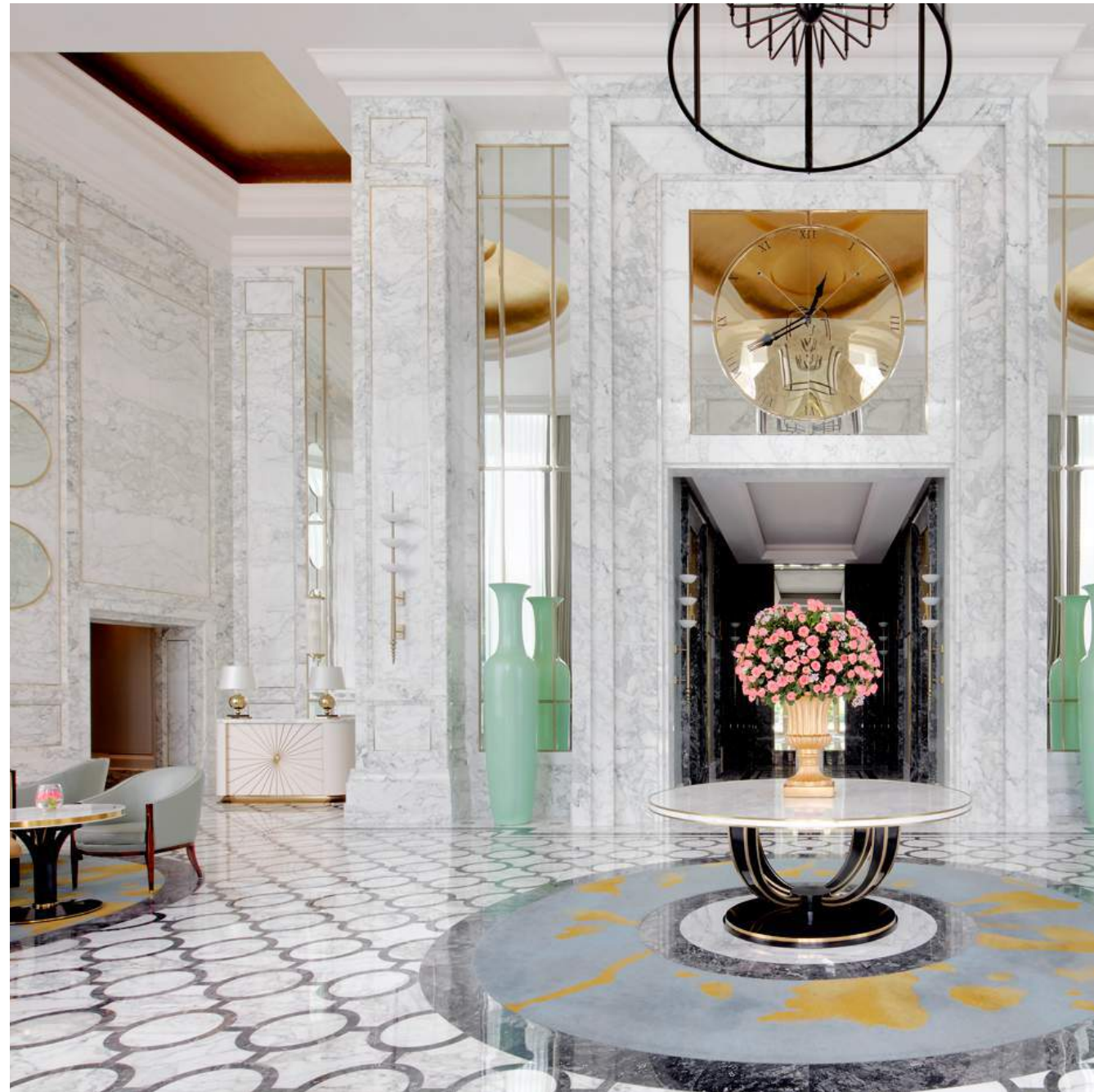
Images of rooms 'lived in' but nobody featured in image are best (Score = 15.4)

EXPERIENCE (FOR ME)

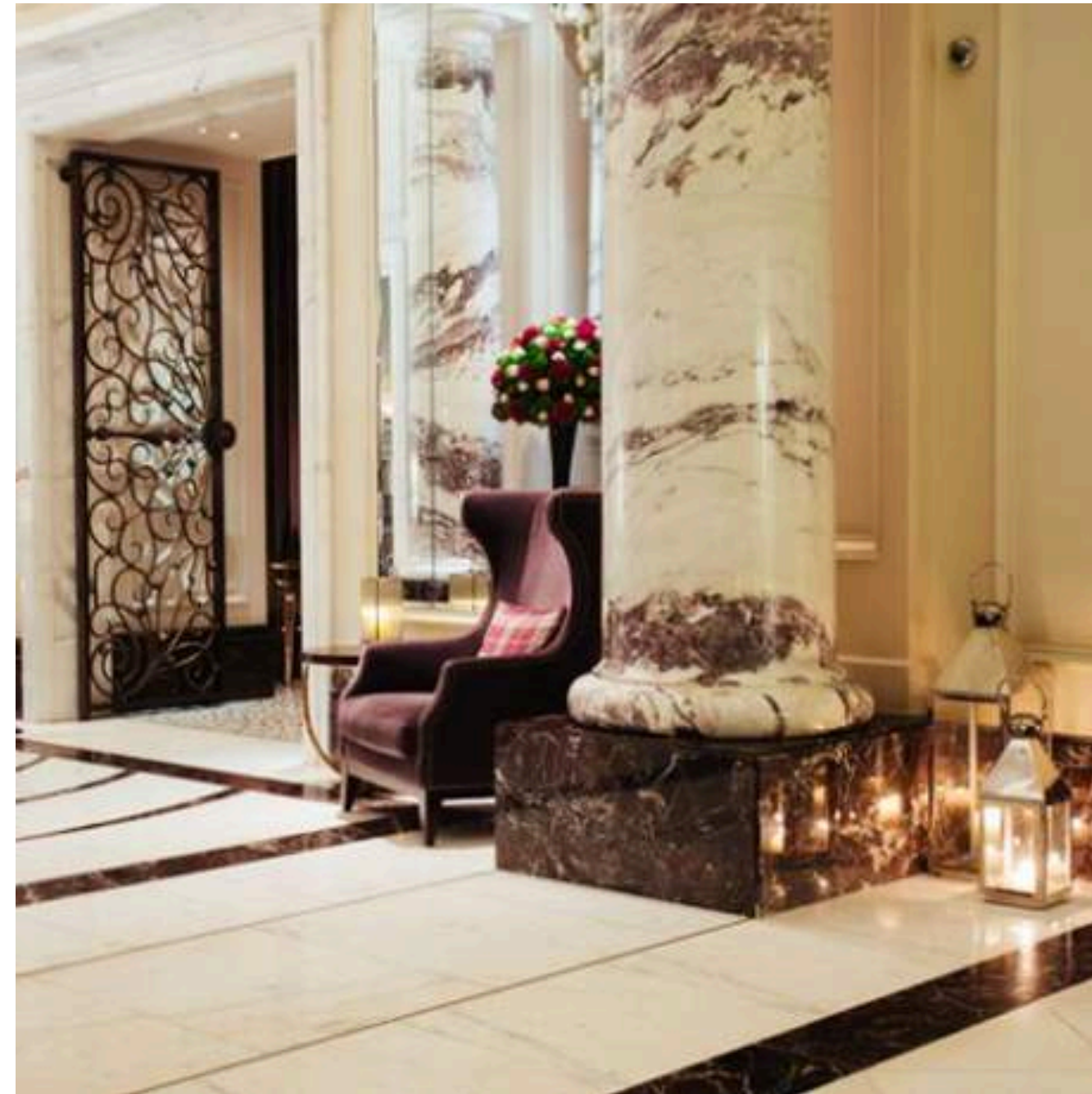
Enable the viewer to better imagine themselves

CONTENT INSIGHTS

What works for hotel groups on social



Cold, stoic, un-inviting images do poorly, the space feels empty
(Score = 2.1)



Creating a mood with lighting or additional material (luggage)
(Score = 6.9)



Having a person in the image improves the sense of energy
(Score = 7.4)

EXPERIENCE (AUTHENTIC)

Find ways to create a sense of comfort, energy with images

CONTENT INSIGHTS

What works for hotel groups on social



Drinks (food) score very low. They aren't why audiences started following the hotel (Score = 1.4)



Drinks as part of the overall experience increase engagement (Score = 3.3)



Drinks featuring proximity of hotel to landmarks in the city do best (Score = 4.8)

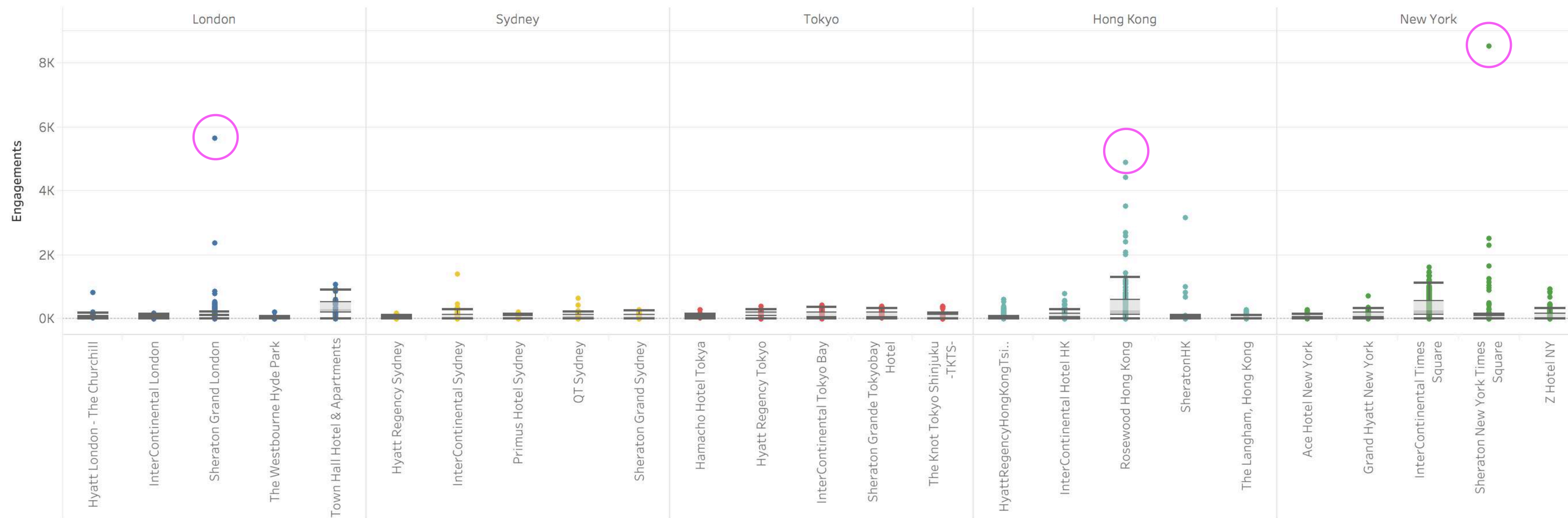
YOUR WINNING FORMULA?

Decide if F&B is going to be a core part of your formula.

Paid social is becoming a key tool to winning with social media - especially on Facebook.

Facebook has increasingly turned into an advertising platform. Its role for Langham is two-fold; (1)building reach/awareness, and (2)promotions for bookings and ancillaries.





PAID SOCIAL COUNTS

From the research across markets / hotels, most of the standout, high-performing contents were a result of paid support - boosting of the posts.

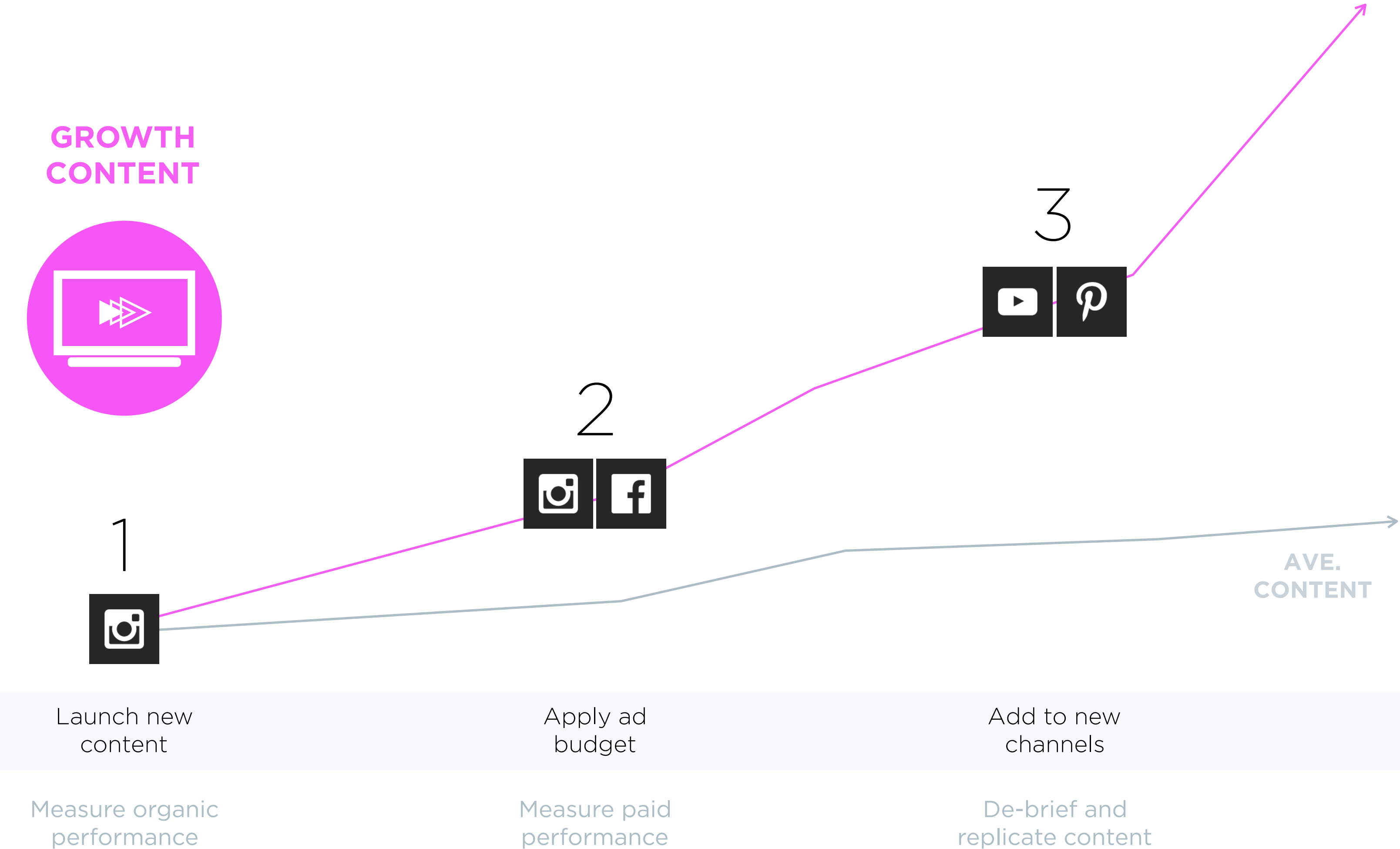
For brands looking to grow share of interest in a market and more quickly achieve success on social channels, a strong paid strategy will help.

CONTENT AMPLIFICATION

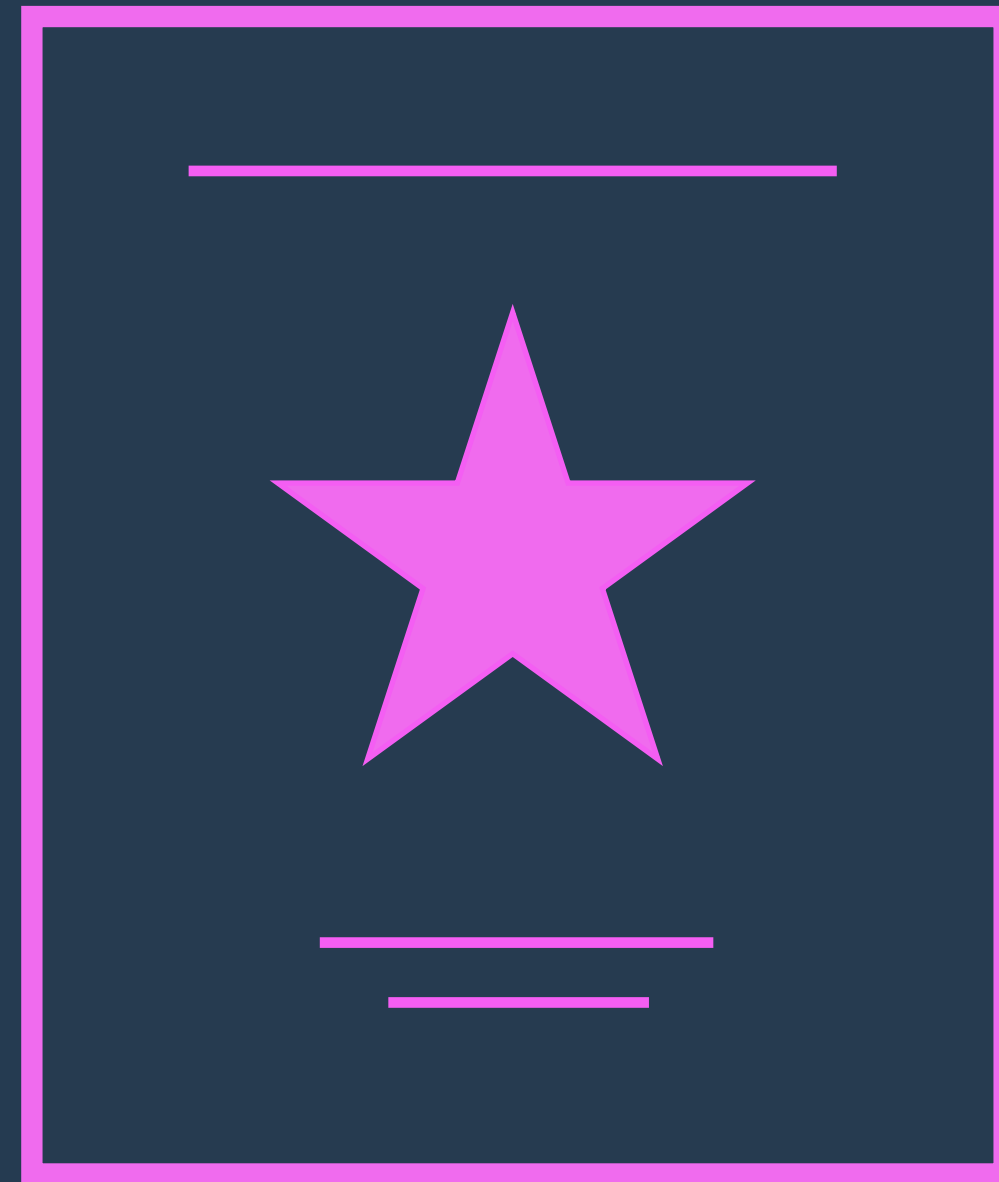
Monitoring organic reach ...and then expanding across channels

A great piece of content can be seeded into a multitude of channels.

When a piece of content gets early traction, it should be promoted, first with social ads, and then into new channels.



PAID SOCIAL CAN HELP INCREASE ORGANIC REACH



Social managers typically monitor organic performance first and then boost top performing posts. While this is a valuable approach, we also found the opposite works well too.

Brands that used paid social first - and then followed up with un-paid posts, were able to increase organic reach by 50% ...when posts were coupled closely together.

Totem Media APAC Social Study 2018. (x. 80,000 social posts)



TIME & LOCATION

CONTEXT IS THE CRITICAL TOOL FOR GROWTH ON SOCIAL



“It’s no longer enough to understand what luxury means to a particular traveller.

It’s about knowing what luxury means to that traveller right now.”

Amadeus, Future of Luxury Travel



CONTEXT MATTERS

Right place, right moment

APRIL
Tribeca Film
Festival



NEW YORK

LOS ANGELES

APRIL
Coachella



LONDON

JUNE
Marylebone
Festival



MARCH
Shanghai F1
Grand Prix



SHANGHAI

MARCH
Art Basel



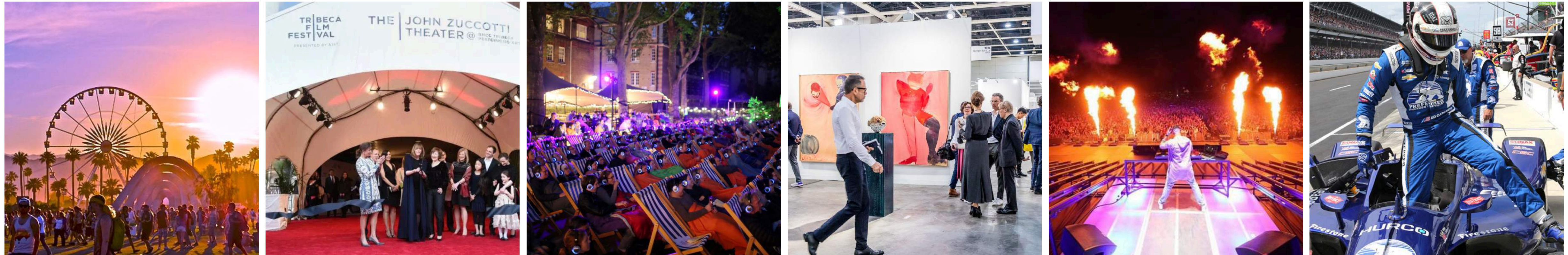
HONG KONG

SYDNEY

SEPTEMBER
Sydney Fringe
Festival



TIMELY EVENTS PER CITY



LEVERAGING HIGH ATTENTION AT PEAK MOMENTS

Maintaining a calendar of events in your city and mapping those events against your audience personae and key topics on social media is a productive strategy.

Upon identifying on-target events/trends, post content (A)before the event (to attract relevant bookings), (B)during the event to demonstrate affinity, and (C)after the event ...as people like to look back on events attended.



55%

Of activity on social takes place on Saturday and Sunday for travel audiences.

Daily, after 5pm is the most popular time (48% of activity taking place).



CITY SPECIFIC INSIGHTS

LONDON, NEW YORK, HONG KONG, SYDNEY, TOKYO

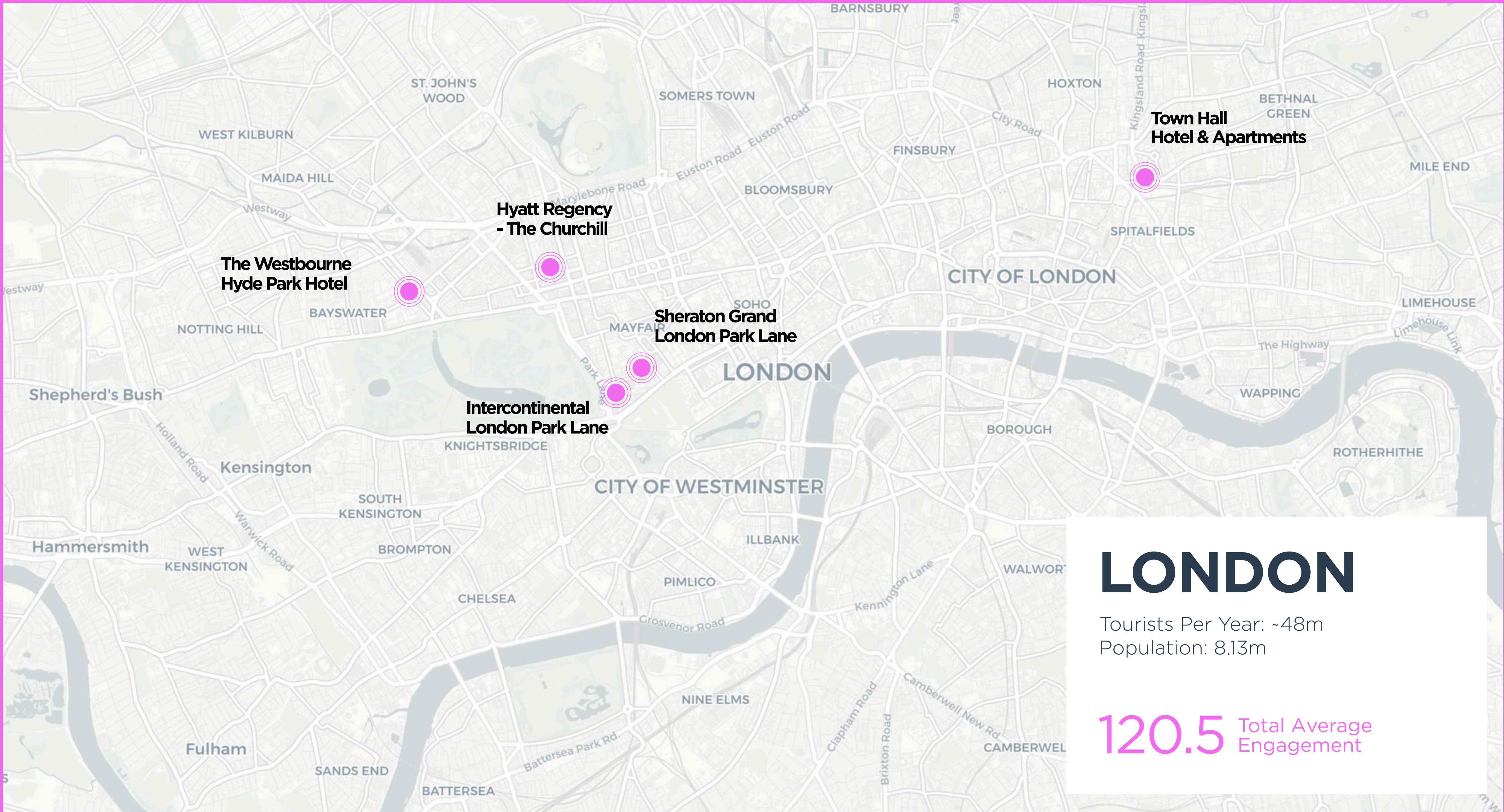


LONDON

Content featuring festivals, events and big moments win with hotels in London.

Images from around the city, diving deep into the experience of being in London rank very highly - especially on Instagram. All cities benefit from a large percentage of city-specific shots ... demonstrating both experiences and scenes/landmarks.





**The Westbourne
Hyde Park Hotel**

**Hyatt Regency
- The Churchill**

**Sheraton Grand
London Park Lane**

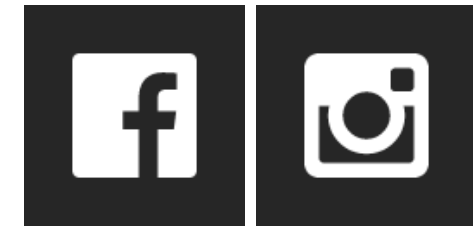
**Intercontinental
London Park Lane**

**Town Hall
Hotel & Apartments**

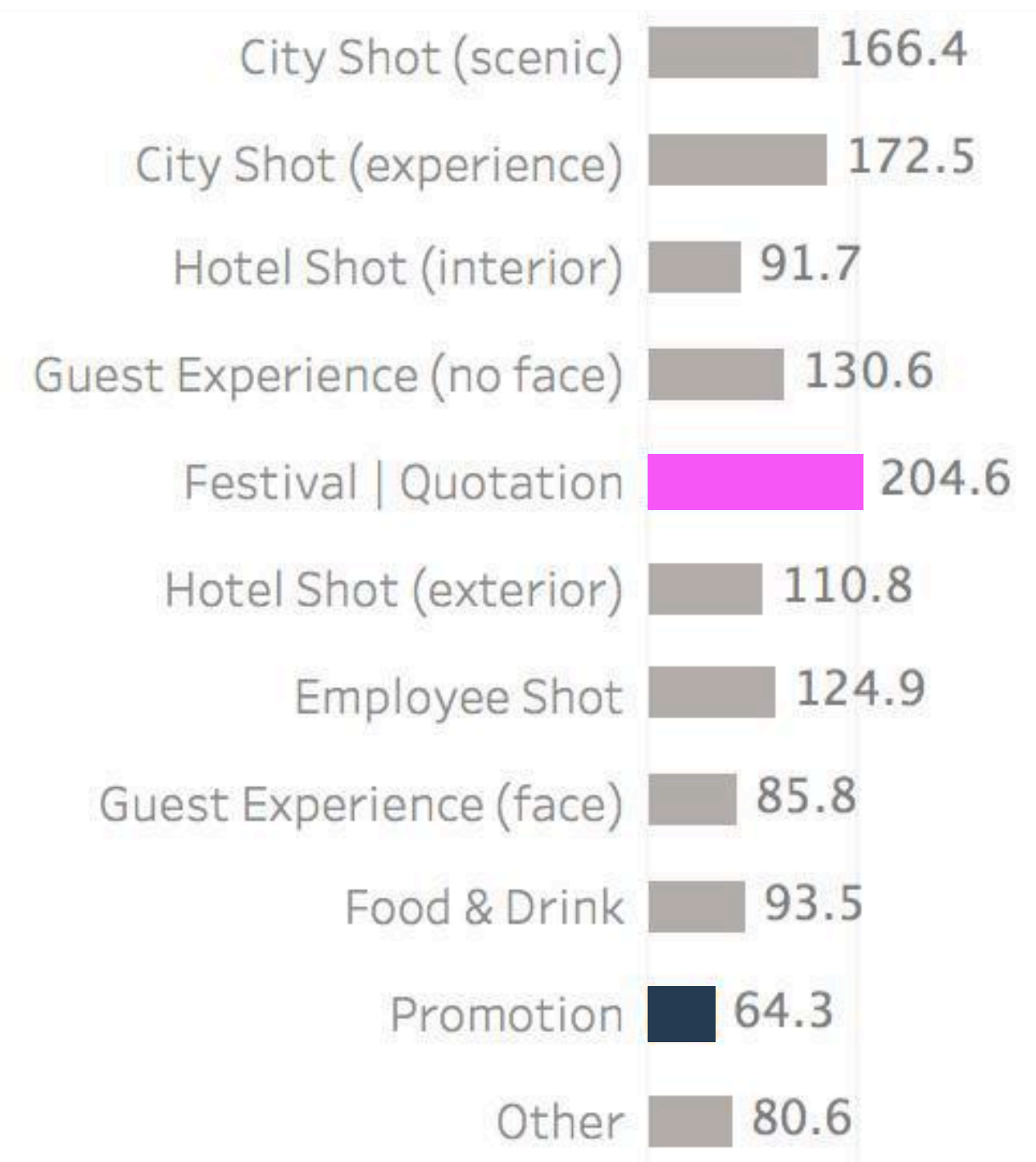
LONDON

Tourists Per Year: ~48m
Population: 8.13m

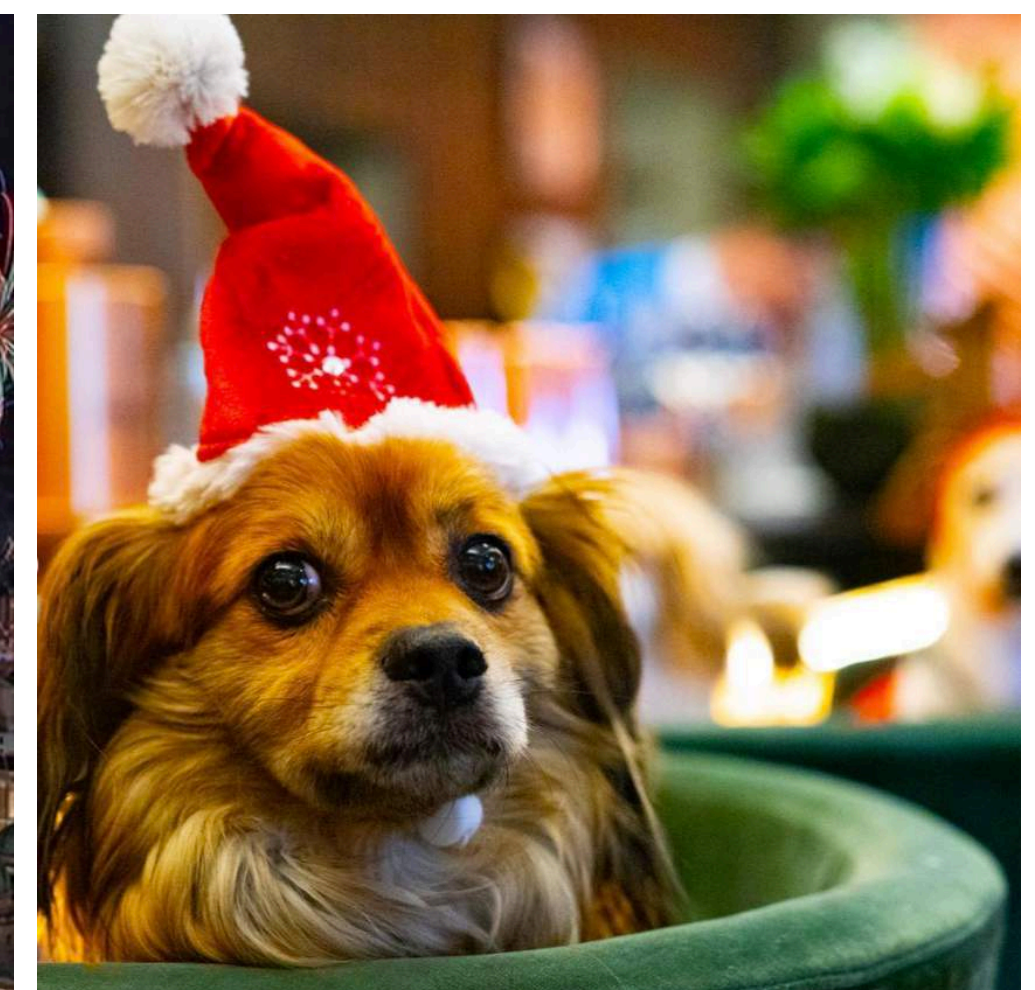
120.5 Total Average
Engagement



SPECIAL EVENTS, FESTIVALS LEAD

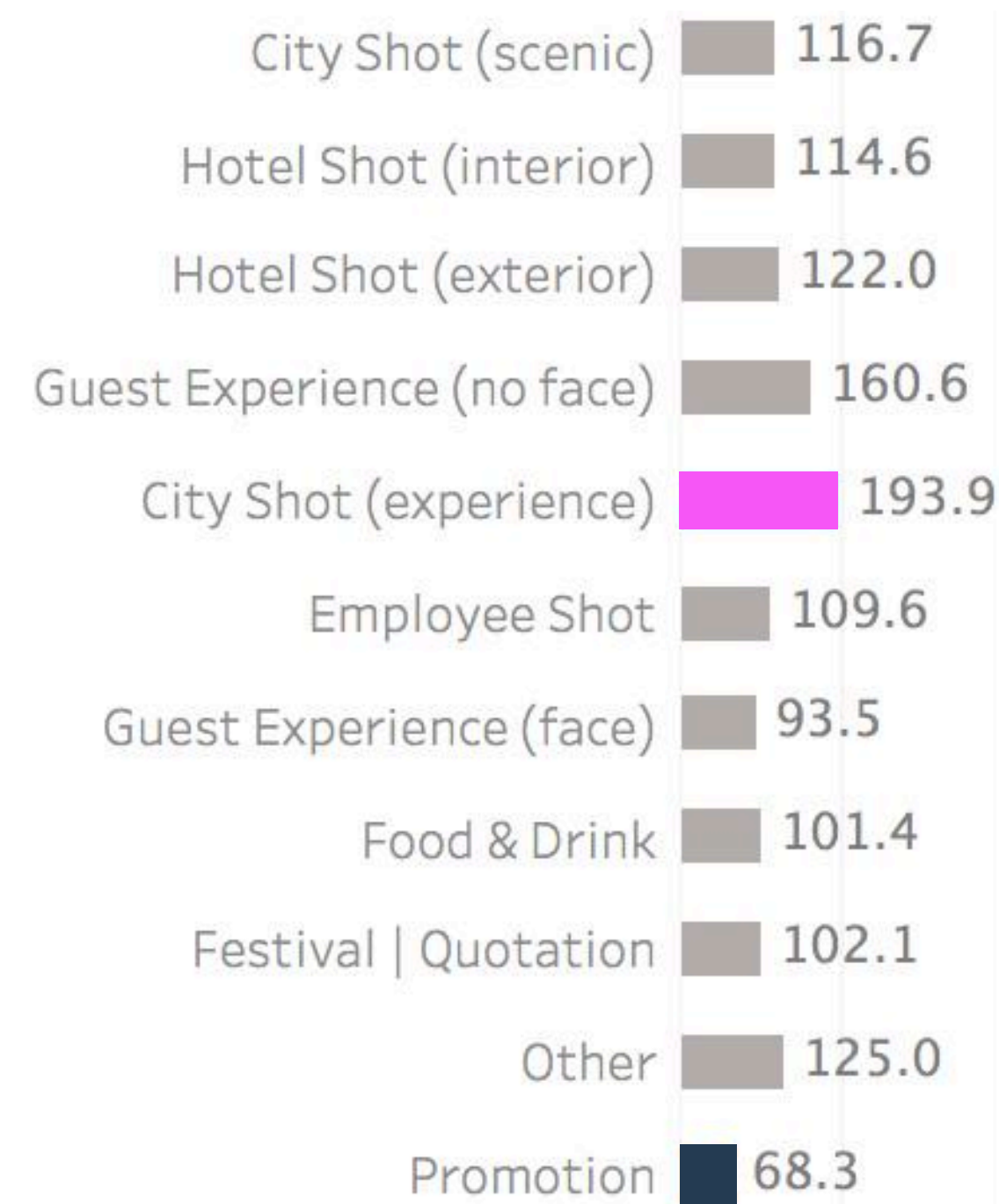


*Engagement Per Post
(Instagram & Facebook)*





CITY IMAGES X EXPERIENCES



Engagement Per Post
(Instagram)

IMAGES
302



34,953
LIKES

VIDEOS
10



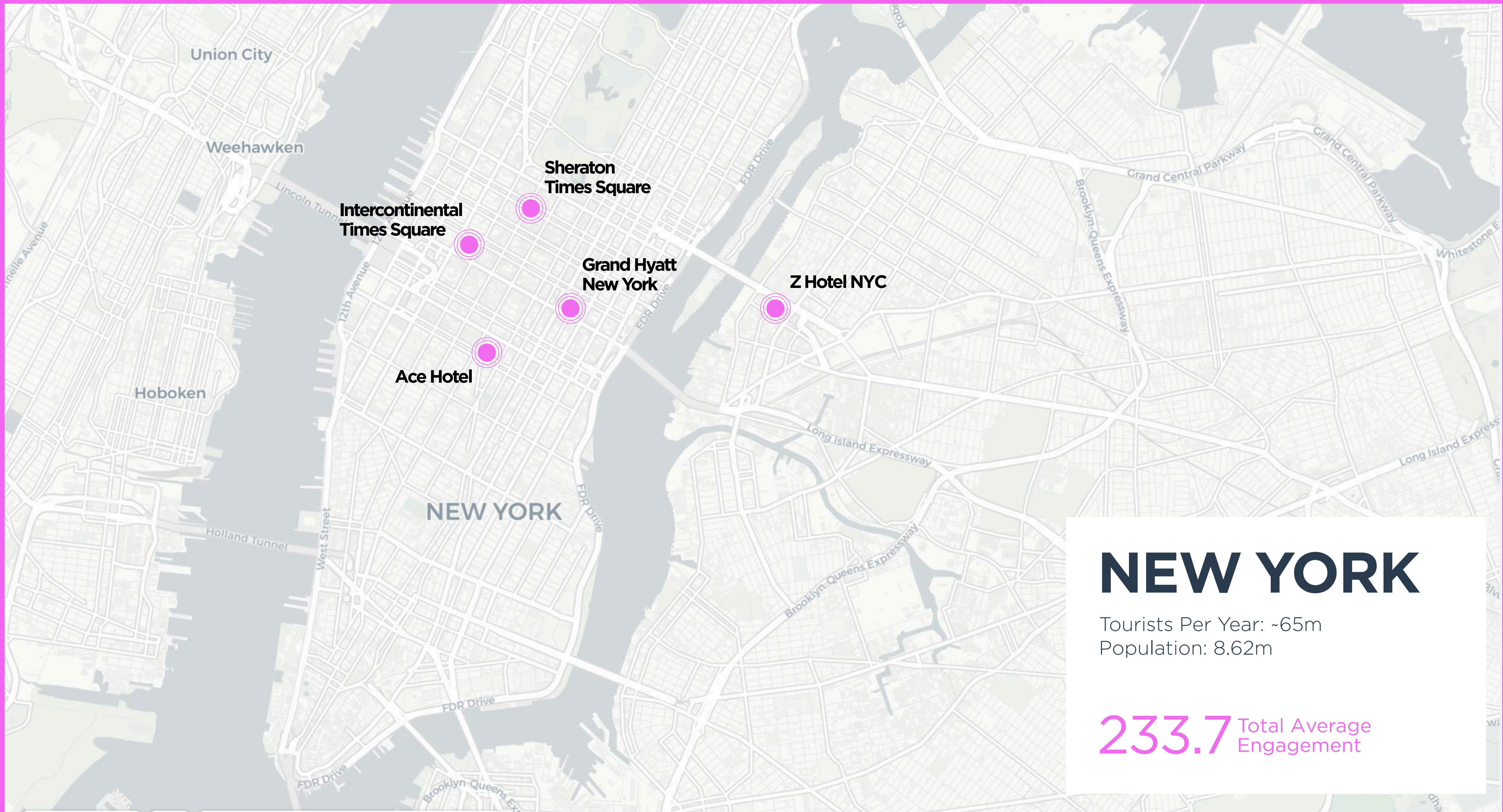
4,524
VIEWS

NEW YORK

Demonstrating a close connection to the city and its heartbeat is a winning strategy in New York. Images of iconic city scenes were most successful.

Having those city images follow a tone, style, design template adds to success with audiences. Demonstrate a brand attitude with an signature image style.





Intercontinental
Times Square

Sheraton
Times Square

Grand Hyatt
New York

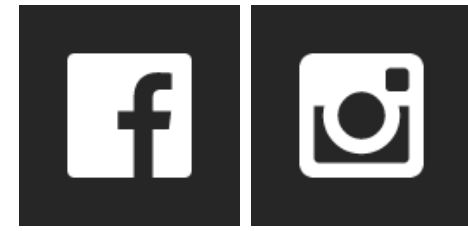
Z Hotel NYC

Ace Hotel

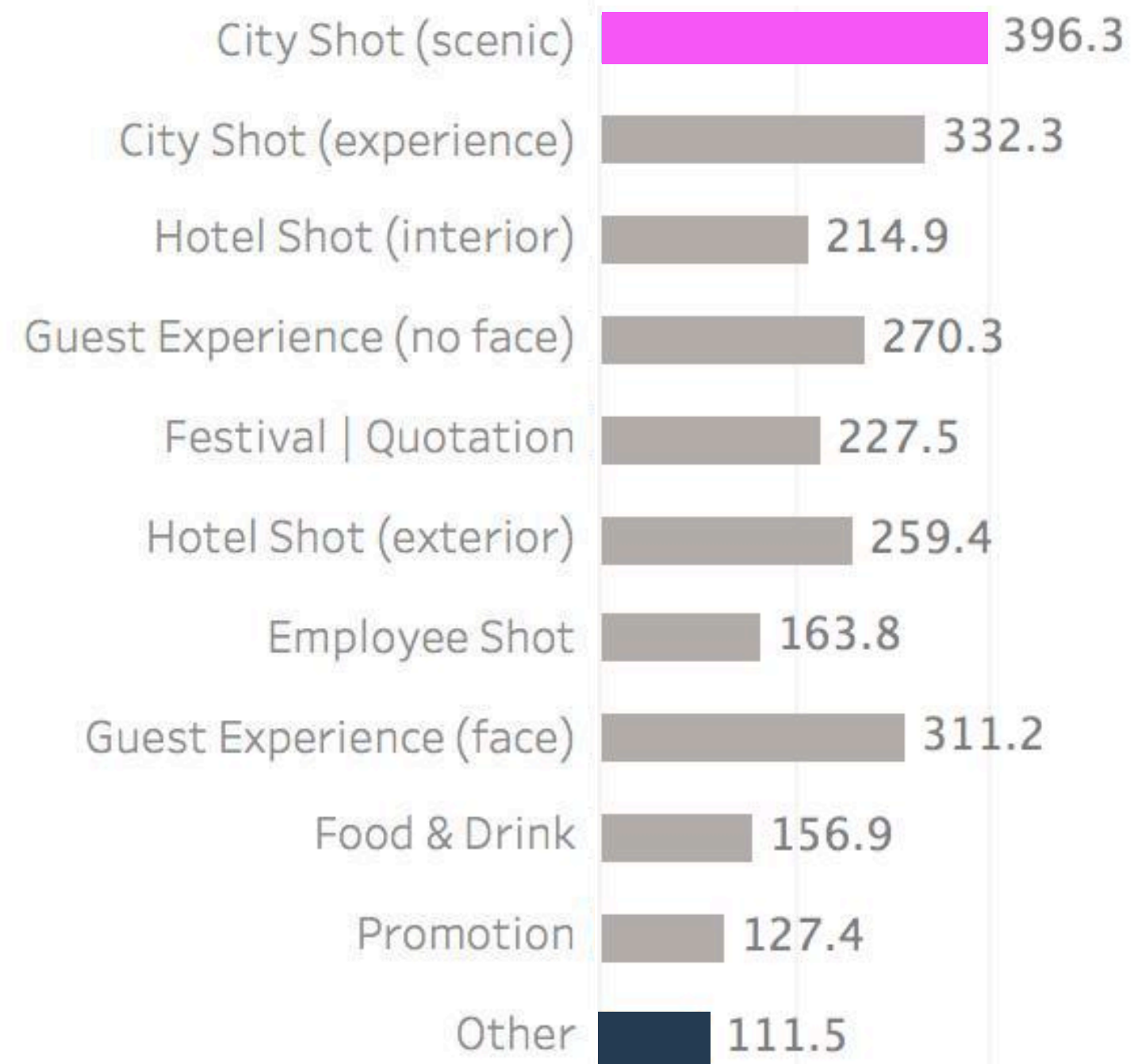
NEW YORK

Tourists Per Year: ~65m
Population: 8.62m

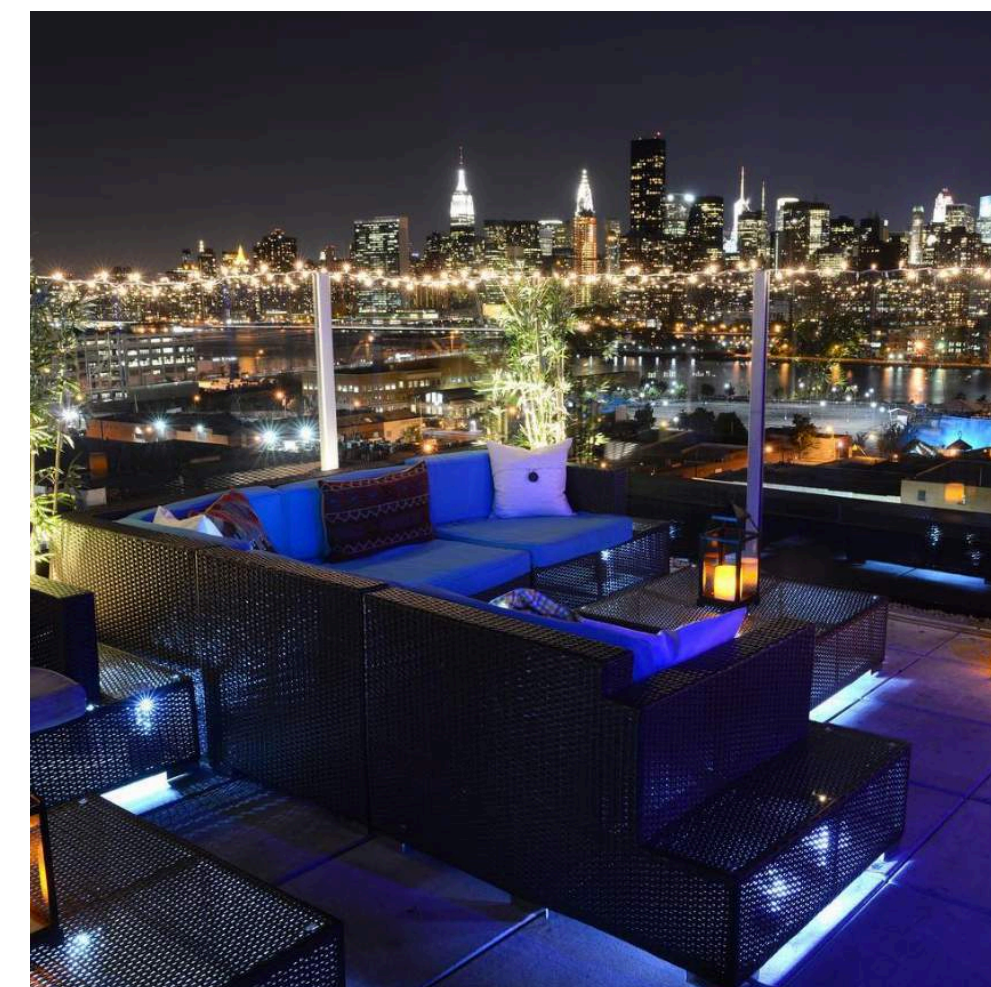
233.7 Total Average Engagement



SCENIC CITY SHOTS LEAD

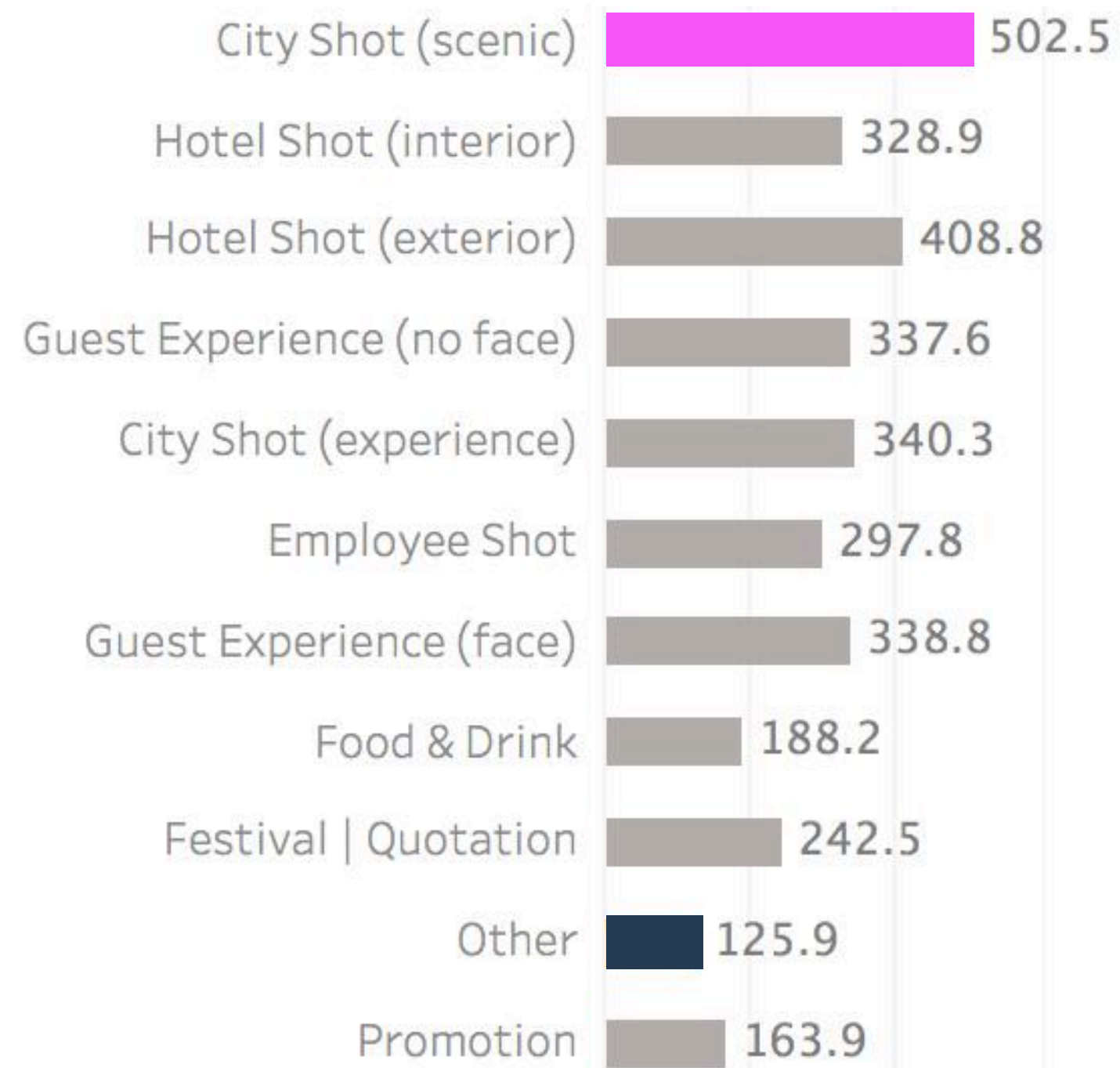


*Engagement Per Post
(Instagram & Facebook)*





CITY IMAGES X SCENIC



Engagement Per Post
(Instagram)

IMAGES
319



97,133
LIKES

VIDEOS
17



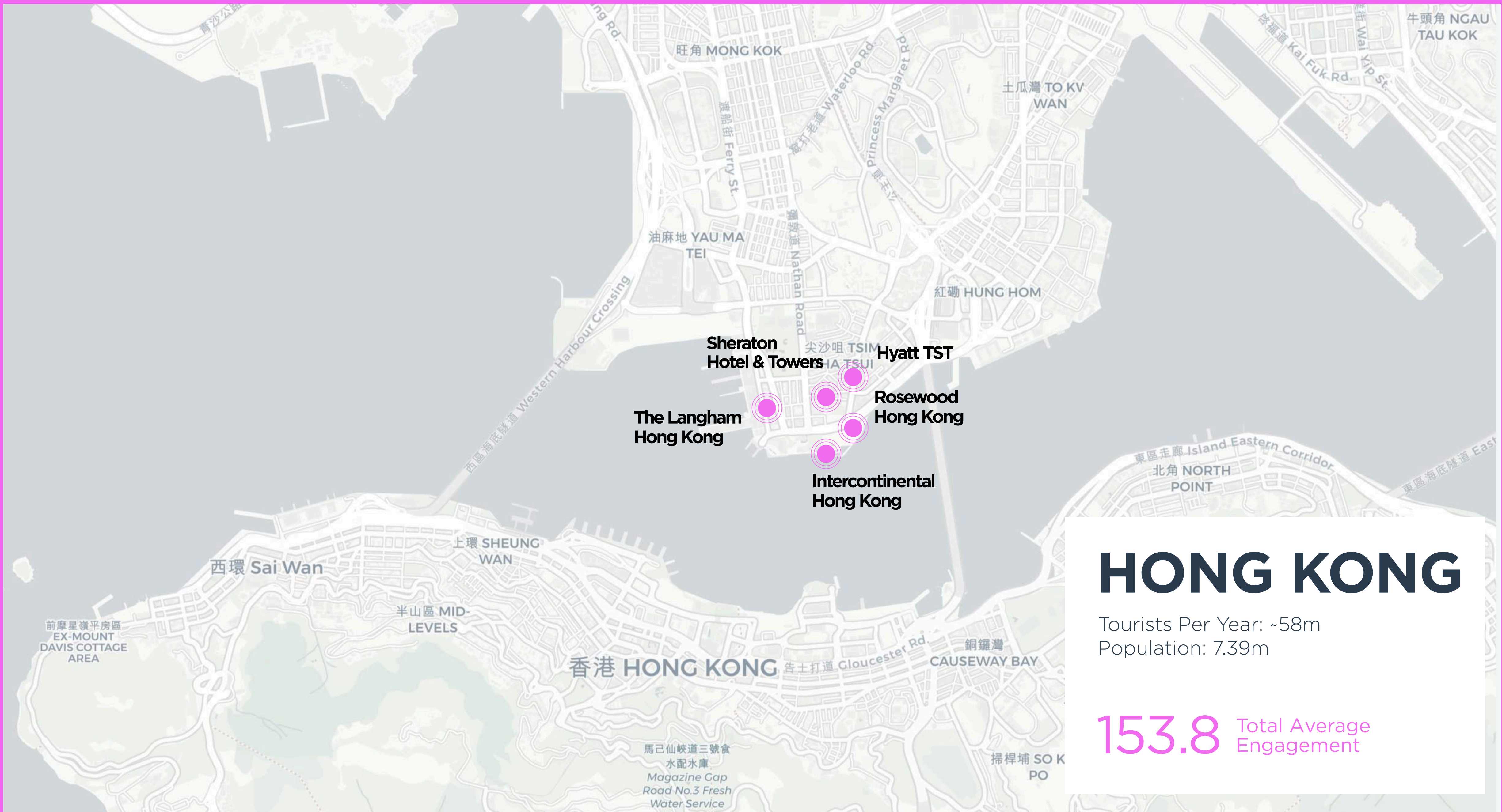
23,098
VIEWS

HONG KONG

Images featuring hotel interiors with great views of the city are most successful in Hong Kong. Travelers look to hotels which connect them to the city, and seeing the cityscape is reassuring.

Hong Kong is such a vibrant, exciting city and so, images which capture this energy have big impact. Images featuring skylines are powerful but so too are those that get out into the hidden areas of cities - they capture the true essence of what the city is all about.





HONG KONG

Tourists Per Year: ~58m
Population: 7.39m

153.8 Total Average Engagement

前摩星嶺平房區
EX-MOUNT
DAVIS COTTAGE
AREA

西環 Sai Wan

半山區 MID-LEVELS

上環 SHEUNG WAN

香港 HONG KONG

馬己仙峽道三號食
水配水庫
Magazine Gap
Road No.3 Fresh
Water Service

告士打道 Gloucester Rd.

銅鑼灣
CAUSEWAY BAY

掃桿埔 SO K PO

東區走廊 Island Eastern Corridor
北角 NORTH POINT

東區海底隧道 East

The Langham
Hong Kong

Sheraton
Hotel & Towers

Intercontinental
Hong Kong

Rosewood
Hong Kong

Hyatt TST

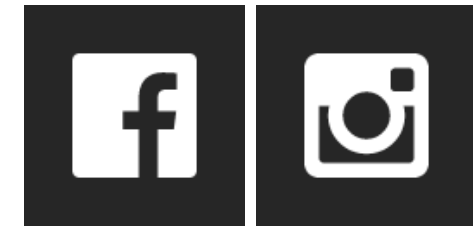
紅磡 HUNG HOM

油麻地 YAU MA TEI

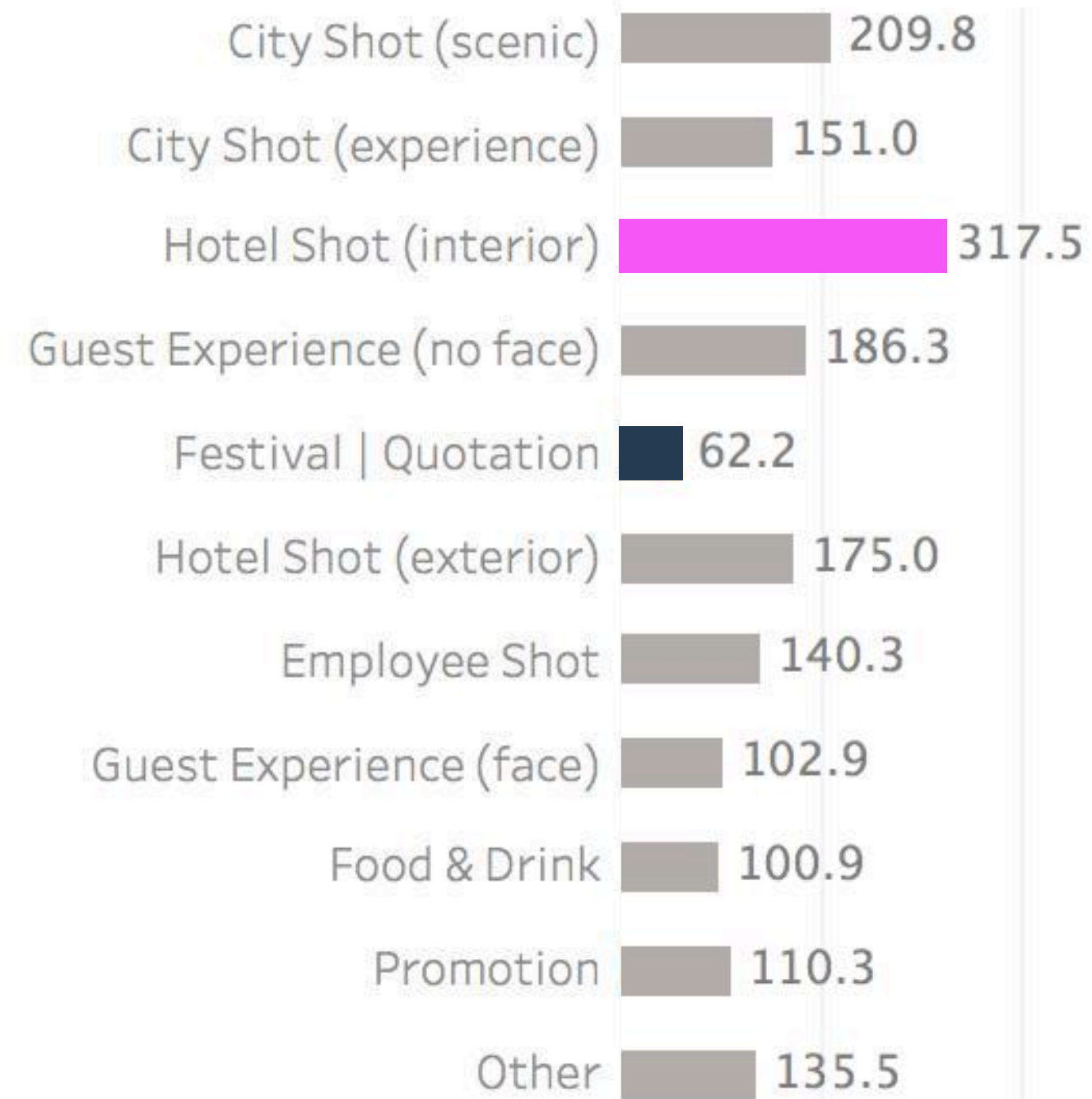
旺角 MONG KOK

土瓜灣 TO KV WAN

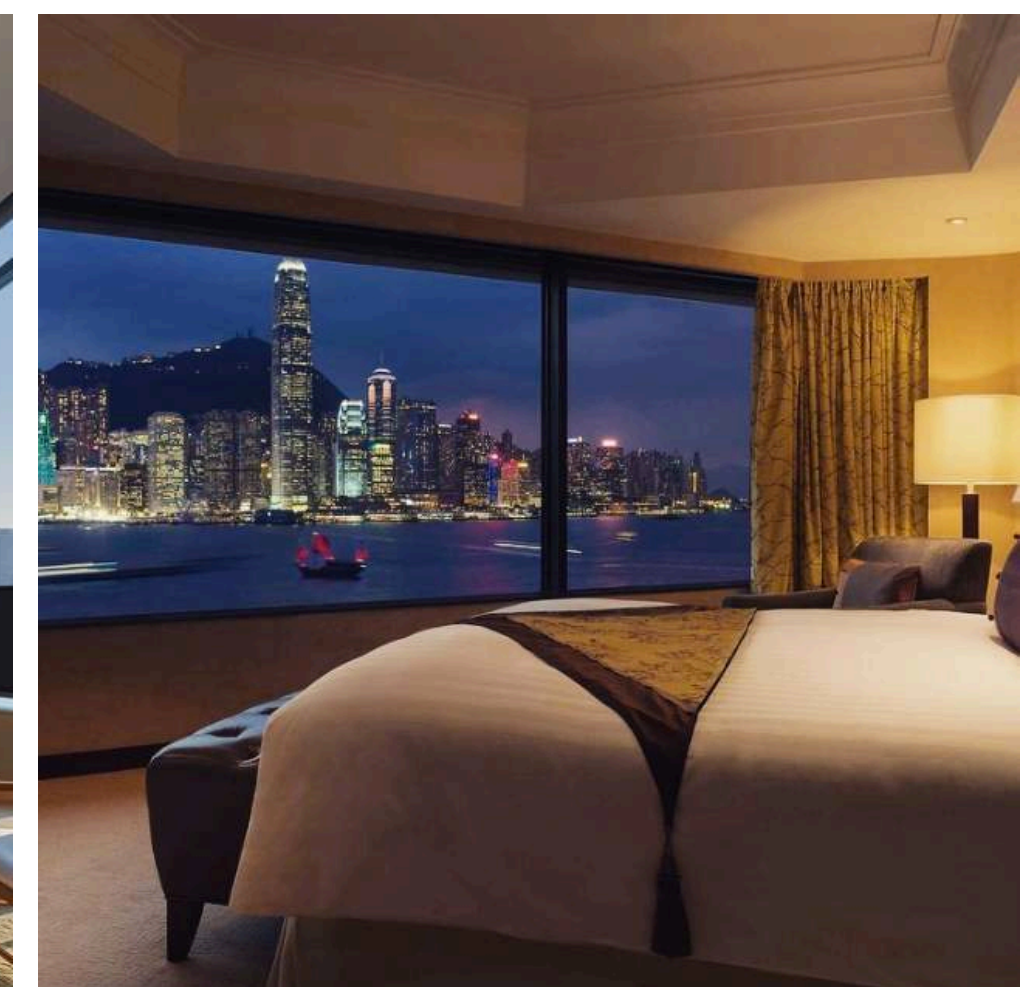
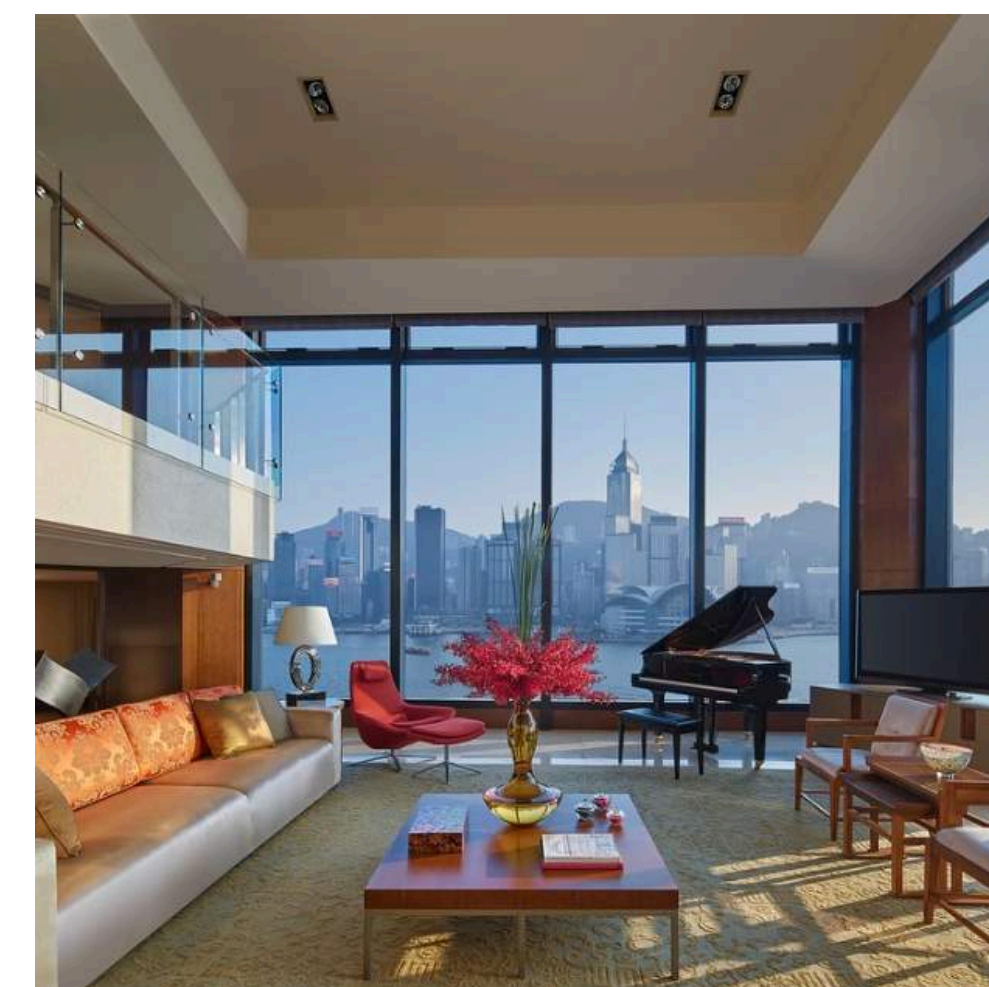
牛頭角 NGAU TAU KOK



HOTEL INTERIOR IMAGES LEAD



*Engagement Per Post
(Instagram & Facebook)*





HOTEL INTERIOR IMAGES LEAD



Engagement Per Post
(Instagram)

IMAGES
429



82,885
LIKES

VIDEOS
61



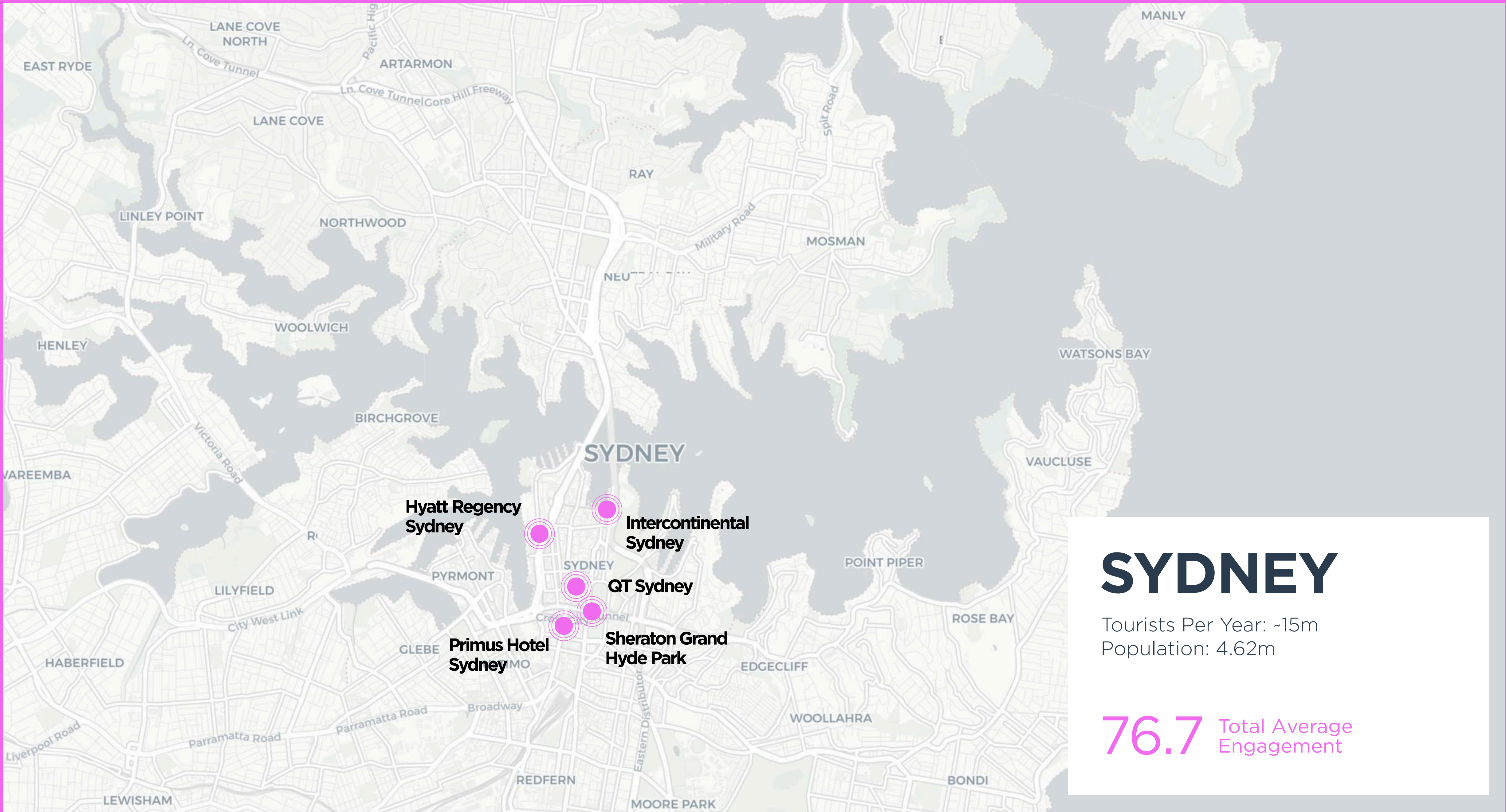
377,630
VIEWS

SYDNEY

Iconic landmarks go a long way in capturing attention on social media. Part of the goal in any city is owning a share of attention for would-be destination travelers.

In Sydney there is also a clear opportunity to showcase action, adventure and outdoor activities - which demonstrate key characteristics (benefits) of the city itself.





**Hyatt Regency
Sydney**

**Intercontinental
Sydney**

QT Sydney

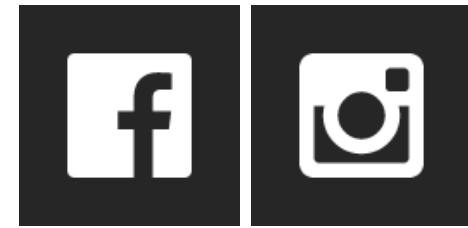
**Primus Hotel
Sydney**

**Sheraton Grand
Hyde Park**

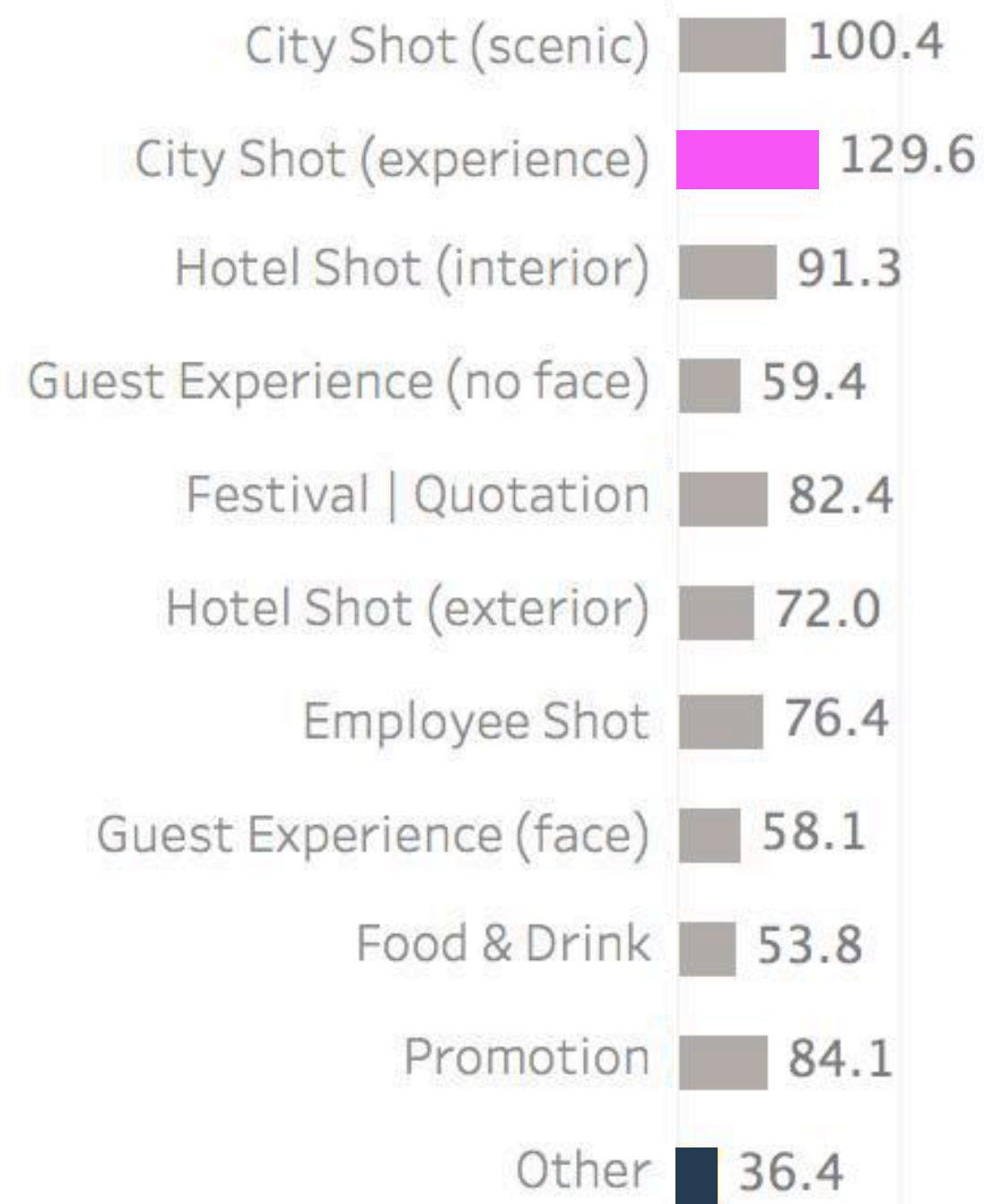
SYDNEY

Tourists Per Year: ~15m
Population: 4.62m

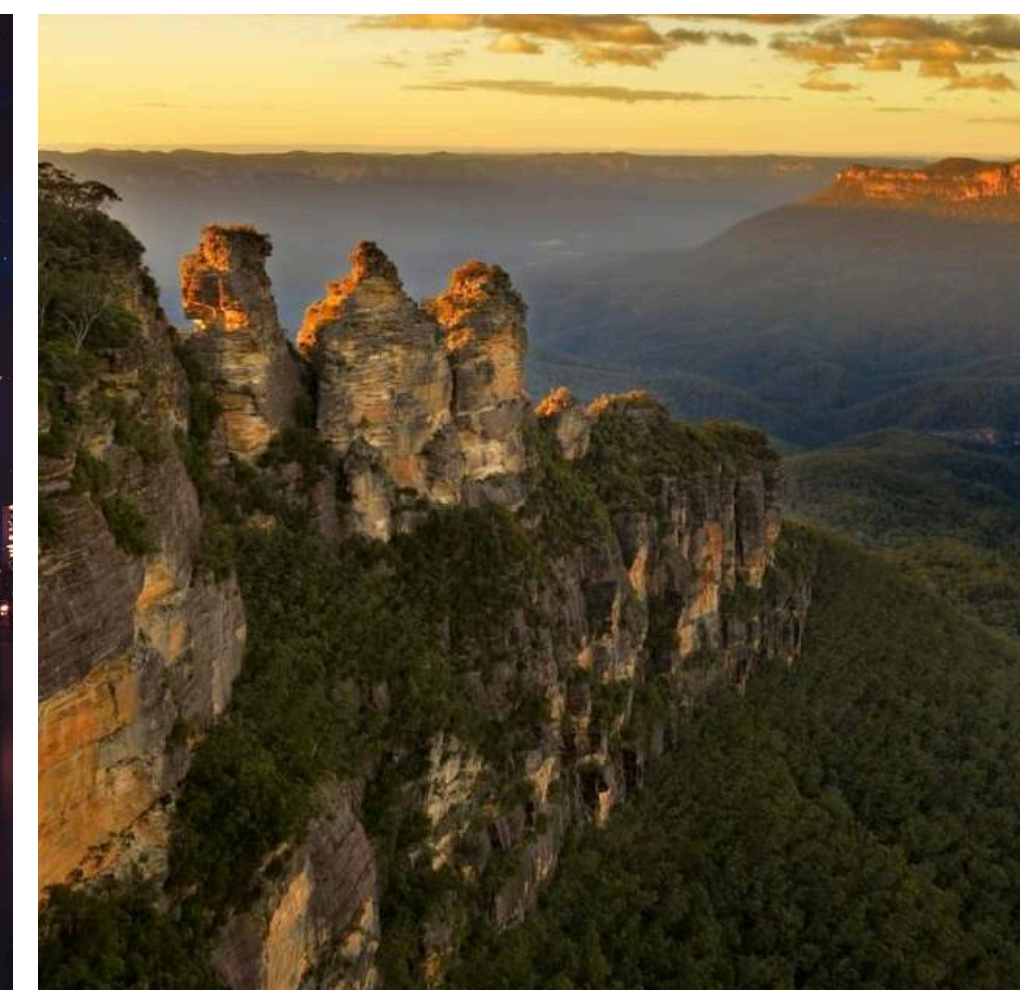
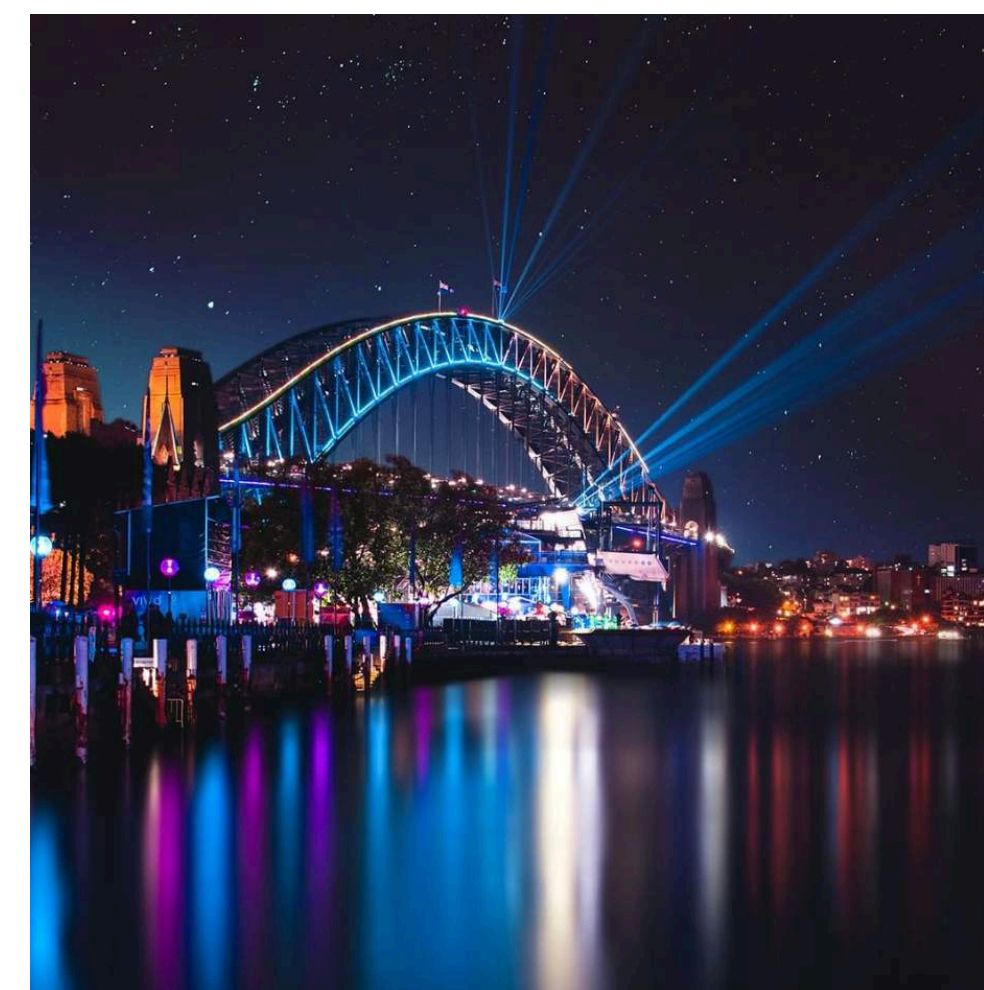
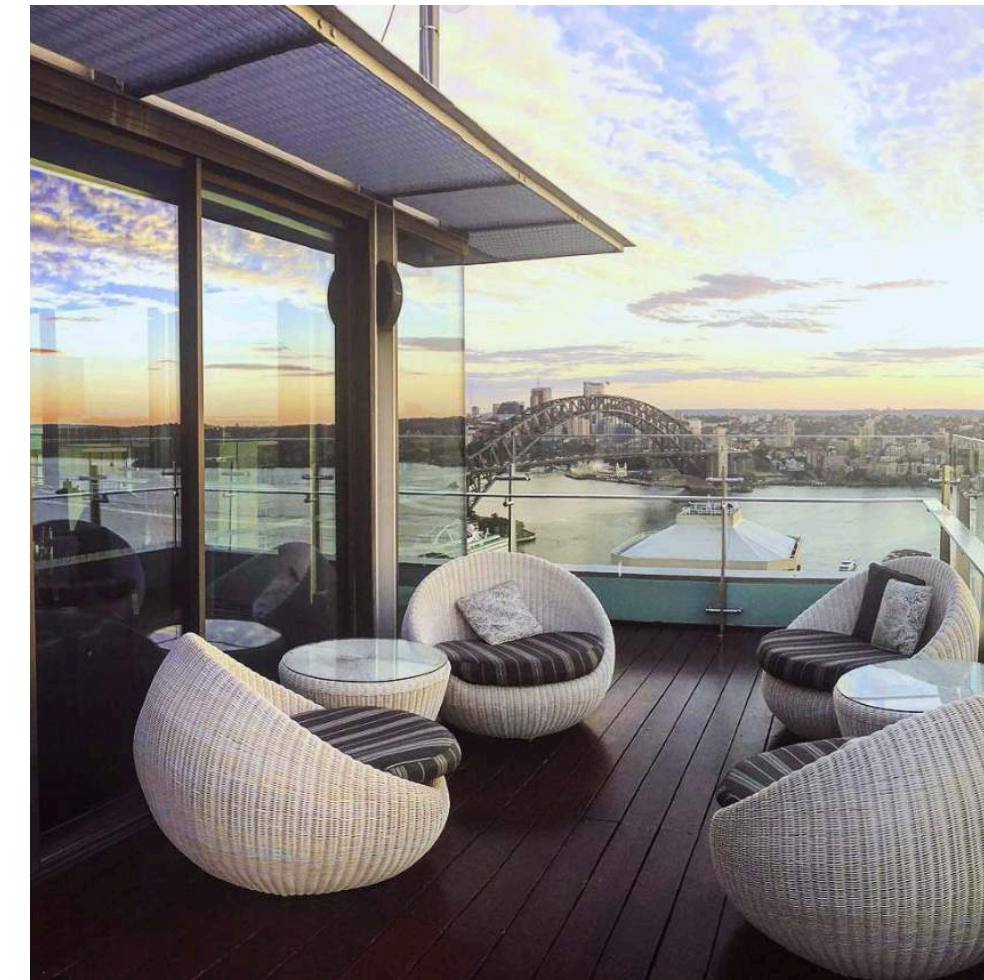
76.7 Total Average Engagement



EXPERIENCE DRIVEN CITY IMAGES



*Engagement Per Post
(Instagram & Facebook)*





CITY IMAGES X SCENIC



Engagement Per Post
(Instagram)

IMAGES
366



36,757
LIKES

VIDEOS
12



9,061
VIEWS

TOKYO

Social posts that celebrate festivals, events and culture go a long way in Tokyo. Hotels that used novelty to celebrate important moments ranked higher than simple celebratory posts.

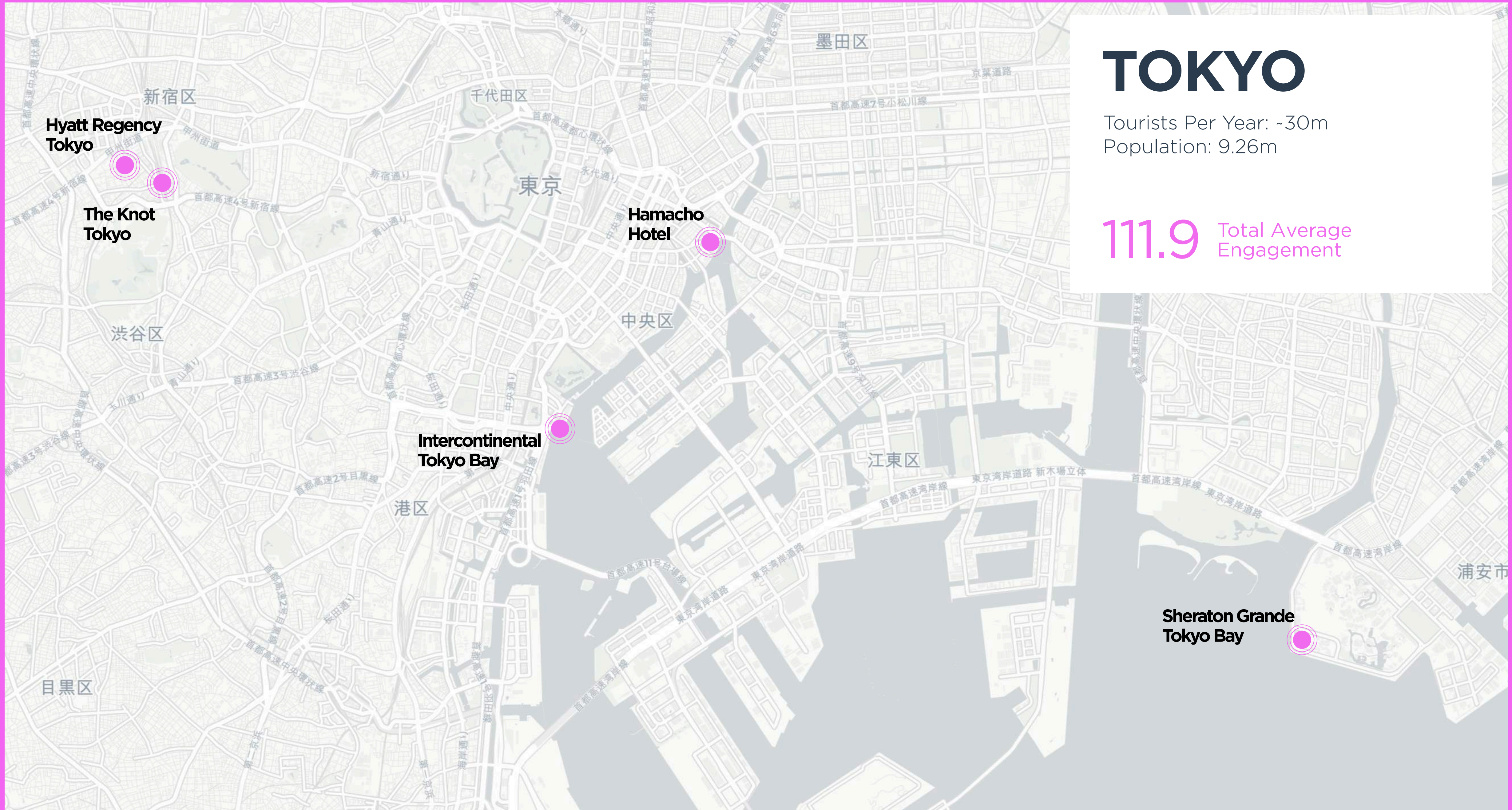
Across all cities globally, hotels follow very safe, average rules with management of social calendars. Hotels in Tokyo suffer more than most markets from this dogmatic approach. Hotels that create their own rules stand to win a larger share of audience attention.

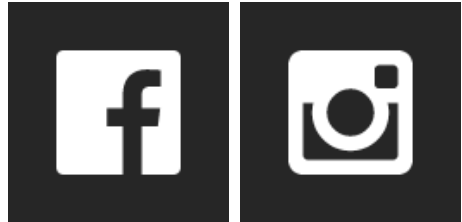


TOKYO

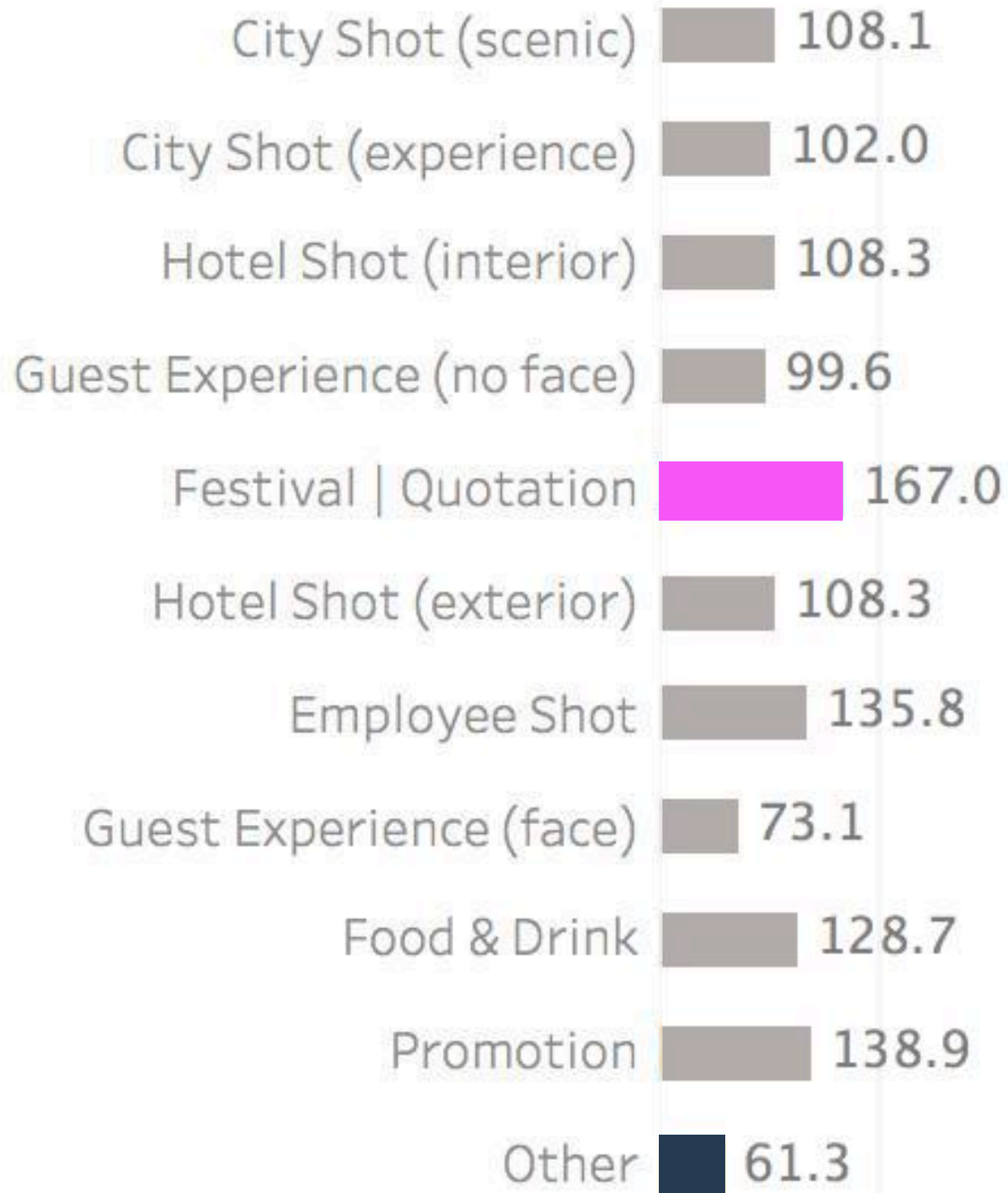
Tourists Per Year: ~30m
Population: 9.26m

111.9 Total Average Engagement



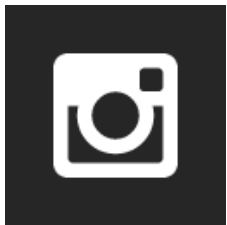


SPECIAL EVENTS, FESTIVALS LEAD

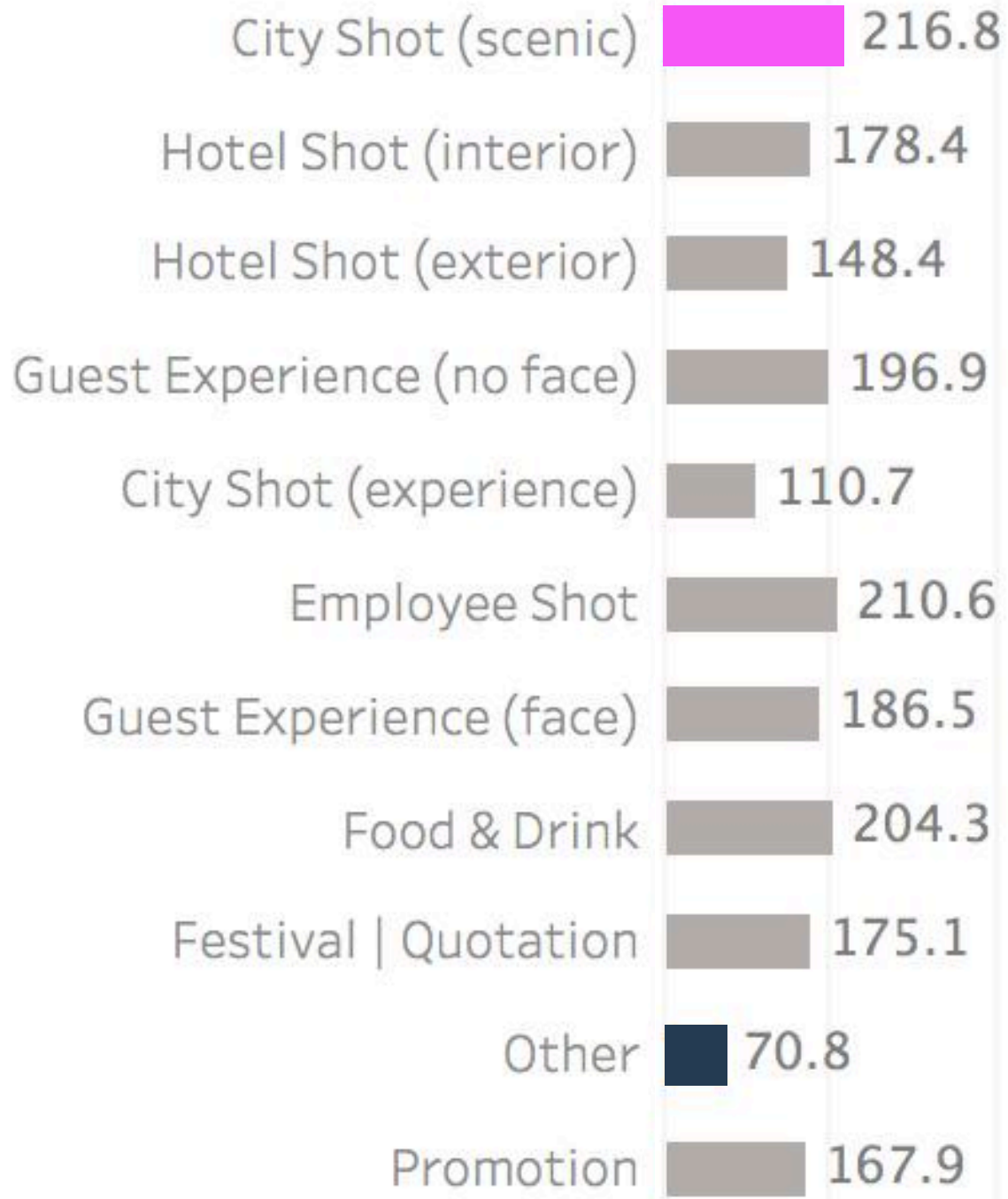


Engagement Per Post
(Instagram & Facebook)





CITY IMAGES X SCENIC



Engagement Per Post (Instagram)

IMAGES

444



79,850

LIKES

VIDEOS

19



17,062

VIEWS

TOTEM



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