

Tourism

TRENDS & INSIGHTS



Fáilte Ireland
National Tourism Development Authority



Best Face Forward

Fáilte Ireland Trends & Insights

Best Face Forward: What is it about?



So many status updates, photos and feelings can now be shared in real-time and all in glorious HD. This has caused two great shifts - one online and one *offline*.

Online, we openly and performatively strive to portray a perfect self at all times. It follows that performative habits are also having an impact on our offline lives; if we become the sum of our real-world experiences, a pressure exists to seek ever more outlets, pursue more leisure activities that help to portray the perfect self.

In the context of travel we have an increasing need for holiday experiences that give us shareable moments, that deliver experiences that make us look good online among our peers.

We can even share holiday wishlists as a way to perform our perfect desires to others and broadcast our personal brand through destination-to-do lists .

What's Driving the Trend?

Consumer Behaviour is complex and as a result trends rarely occur in isolation. This trend is influenced but the following other trends

MOBILE LIVING

Smart devices connect us with work, pleasure and hobbies anytime, anywhere.

US smartphone ownership:
2015: 67%
2018: 79%



CULTURE OF RECOGNITION

Social capital is built through the accumulation and display of personal skill / achievements /leisure activities.

7 in 10 in GB feel need to be appreciated by others



NETWORKED SOCIETY

We are living in the age of instant communication and immediate information retrieval.

1 in 4 in GB post photos on social media via smartphone



BEST FACE FORWARD

Trend in Action

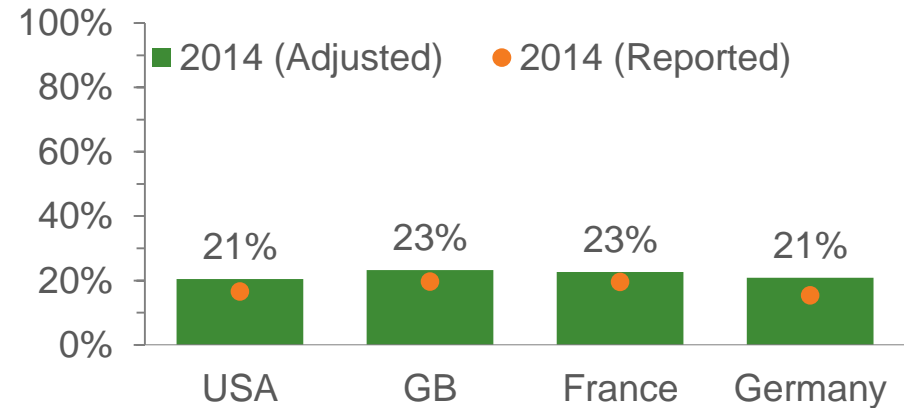


▲ **El Camino** is a travel start-up that offers holiday packages to South America that include a personal photographer.

▶ **#Noshittyphotos** initiative helps amateur photographers pick the best spot and angle by placing stencilled positioning markers at key tourist sites thus relieving their followers from seeing poorly captured iconic views

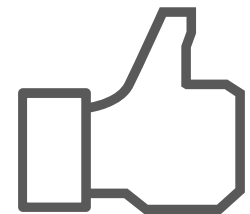


Wishing you were more like the person you portray on social media: % who agree

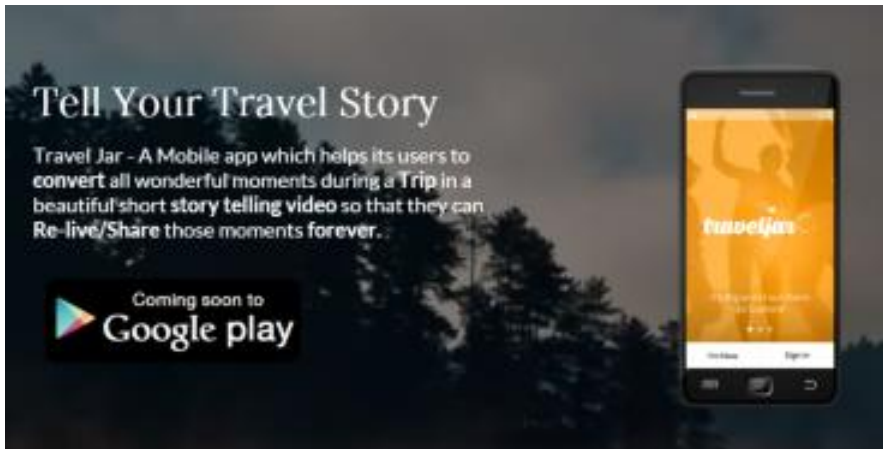


▼ % I like it when people acknowledge my posts / photos / comments on social networking sites

USA: 69%
 GB: 66%
 Germany: 49%
 France: 48%



Trend in Action



- ◀ TravelJar is an app which helps people to edit their travel holiday photos / videos into a beautified storytelling video montage that they can share on social media.

TravelJar App

<https://www.youtube.com/watch?v=IT87P3wtKg8>

- ▶ In 2014, hotel chain **W Hotels** added a remarkable feature to their range of concierge services.

At a minimum cost of \$3,000, guests at any of the chain's New York-based hotels were given the opportunity to access a team of digital experts to document their wedding day on social media whilst censoring unwanted online commentary from others



Trends on the Ground

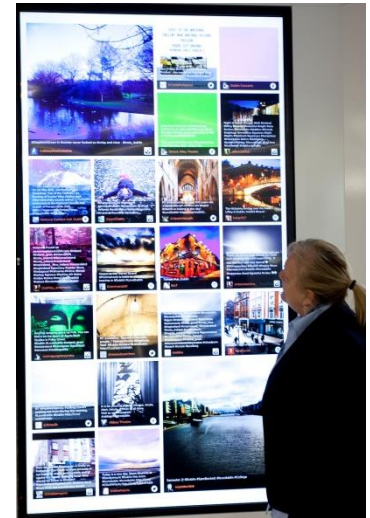


◀ **Wild Atlantic Way Photo** points: these Photo Points highlight signature experiences and key photo opportunities, ensuring visitors don't miss the ultimate photo op



▶ **#LoveDublin** allows visitors to share their experiences and images of Dublin with other visitors and fans of Dublin.

▶ Tweets and images are shared in the Dublin Tourism Information Office for inspiration for other tourists





STAGE OF CONSUMER JOURNEY	ON HOLIDAY	POST HOLIDAY
<p>SOCIAL ENERGISERS</p> <p>Want happening days and extraordinary nights</p>	<p>On holiday 86% of Social Energisers will have some sort of device with them and will access the internet most often and especially when out and about rather than just on free Wi-Fi. This group are also most likely to share photos of themselves experiencing something novel, authentic and interesting while on holiday (in the moment) and when they return home especially on social media and review sites.</p> <p>In order to take advantage of this trend think about what is absolutely unmissable about your product/experience or location? Consider - how you can make your business more 'Facebookable', talked about, shared and social? Where is the optimal location for a 'selfie'?</p>	
<p>CULTURALLY CURIOUS</p> <p>Want to get under the skin of a destination and travel like a local</p>	<p>Like the intimacy of telling stories of their holiday first hand to friends and family. This group want to tell stories that no one else will have - authentic travel with 'one of a kind' experiences are their status symbol. The Culturally Curious are more likely to write a review of a bad experience than a good one.</p>	
<p>GREAT ESCAPERS</p> <p>Want to escape real life pressures and spend time with loves ones</p>	<p>Are not concerned with validating their holiday experience by sharing their thoughts and images online and are the least likely of all the segments to use the internet while on holiday; they stick to free Wi-Fi where they can.</p> <p>They prefer to collect and share their photos, mementos and memories post-holiday with friends.</p>	

Make this Trend Work for You

- ▣ Ensure your visitors know you're on Facebook, Instagram and other social platforms. Display and communicate your addresses / handle at all opportunities
- ▣ Make Wi-Fi available so visitors can instantly 'share the moment'
- ▣ Ask your visitors to share their positive experiences with their networks or write a review on Tripadvisor
- ▣ Collect positive testimonials and ask for permission to use visitors selfies in your promotional material
- ▣ Direct visitors to uncover key '*photo-able*' opportunities, ideally while tagging your business or bringing your offering into the frame.

Examples of Trends Working

The **Four Seasons Hotel in Austin** hosted a photo scavenger hunt. Travellers and fans could take part, and submit photos of the hotel and local landmarks on Facebook.

The first 100 people to complete the tasks won an overnight stay in the hotel. Photos are a good way to engage fans, and providing an interesting way to take them, as well as a reason to post them, helps to publicise your company.



Norwegian Cruise Line created an online quiz “How Norwegian Are You?”, which, after taken allows you to create and post videos on social media platforms, which included music and photos of your friends and a sticker telling you how you did in the quiz.

What's next? Timehopping

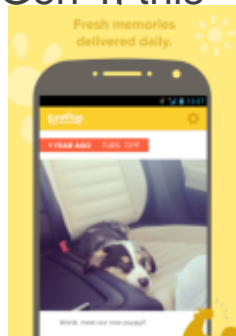
The development of 'Best Face Forward' is changing how we are preserving our memories as everything we capture is there to be looked back on in a digital archive. This is creating new questions among those with a performative mindset : How do I record the present in its full authenticity while ensuring that it does not age too quickly? And how do I pick which moments to highlight in the first place - knowing that later I will want to look back on them?

Timehopping is the emerging awareness that the *emotional* value we will someday experience in the future will be based on how we preserve the present.

Signals

1 in 3 feel at least if not more nostalgic about old social media posts than printed holiday photos - and when we look at Gen Y, this rises to 40%.

▶Timehop is an app that pushes you a memory – a social post from that exact day a year previously.



Impact

- ▶The emerging trend of Time-hopping suggests that self-aware social behaviours are becoming more considered – this may reduce the amount we share but also intensify the need to perfect those things we do share.
- ▶Awareness of our impact on the future reinforces need to be able to capture great holiday memories.
- ▶Is there an opportunity for Ireland to use nostalgia to motivate repeat visits?

What's next? Gen Z Social Media Habits

While Gen Y (Millennials) may have been a Facebook centric generation, It is gen Z – currently those aged 7-15 - who are a truly multiplatform and authentic social generation.

Gen Z are navigating towards platforms them to express themselves seamlessly and authentically. Social media is an extension of themselves rather than a performative foil to life as is the case with Gen Y.

Signals

Ofcom data shows that the number of Gen Z who claim Facebook is their main social media platform is declining. 58% in 2015, 75% a year ago.

► 4 in 10 UK Gen Z use Snapchat: an increase of 65% compare to last year (Ofcom)



Impact

► New social sharing platforms will be more important for Ireland to engage with as this is where Gen Z are communicating

► Being more used to a privacy-lite existence the performative aspect of social media is less strong for Gen Z, who will only be sharing what is true to them and their interests.

► As they mature the need for recognition and to perform will likely increase but we may see a lessening of the performative trend.