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**Social media as a destination marketing tool:
An exploratory study of the use of social media among National Tourism
Organisations**

Abstract

Social media are gaining prominence as an element of Destination Marketing Organisation (DMO) marketing strategy at a time of public sector cuts and a need to seek greater value in the way marketing budgets are spent. Social media offers NTOs with a tool to reach a global audience with limited resources. The aim of this paper is to explore the usage of social media among the DMOs of the top ten most visited countries. The study uses content analysis and semi-structured interviews to examine the usage and impact of social media marketing strategies and identifies a framework of best practice for other NTOs. The paper argues that social media usage among top destination marketing organisations is still largely experimental and that strategies vary significantly.

Keywords: DMOs Social media Twitter Facebook

Introduction

The creation and accessibility of the Internet has fundamentally changed our daily lives and in the case of tourism, it has reshaped how travellers access information, the way they plan for and book trips, and the way they share their travel experiences (Buhalis and Law, 2008; Senecal and Nantel, 2004; Xiang and Gretzel, 2010). One current, significant development in evolution of the Internet is the increasing prevalence of social media platforms that enable Internet users to collaborate and communicate via publishing original content such as blogs, videos, wikis, reviews, or photos. ¹Research has already established that social media websites, facilitating consumer-generated content (CGC), are widely used by online travellers (Gretzel, 2006; White and White, 2006). Researchers and journalists have also noted that when planning a trip, consumer-generated content and reviews (via sites like Tripadvisor.com), are widespread and may even undermine the authority or reliability of a traditional destination marketing organisations (DMOs) or conventional advertisements (Gretzel et al., 2000; Gretzel, 2006; Rand, 2006). With usage and the significance of social media in tourism growing, it is pertinent to conduct, research into how tourism companies and organisations are responding to these developments given that many companies remain uncertain of how to utilise social media to their marketing advantage. This study seeks to understand how widespread the usage of social media is among the marketing organisations of top international tourism destinations. More specifically, this paper has four specific research objectives:

¹ A glossary in Appendix 1 outlines many of the technical terms associated with the use of social media on the internet.

1. To examine the ways in which, and for what purposes, top national DMOs are strategically employing social media to market their destinations.
2. To demonstrate the varying degree of usage of social media among top national DMOs.
3. To determine what factors, if any, contribute to a high and/or advanced level of social media activity
4. To identify examples of best practice from the use of social media by NTOS

To meet these research objectives, this paper commences with a review of the literature on social media and its use in Tourism. This is followed by a discussion of the research methodology employed and the analysis and findings. The paper then outlines the implications of the study.

Social Media and Tourism

Social media are changing the way society consumes and contributes to the creation of information. Technology now allows individuals to easily contribute their thoughts, opinions, and creations to the Internet, and thus, to a wide public of many other individuals. This has radically altered the way in which information is created and disseminated.

As market intelligence reports show, social media are undoubtedly gaining popularity and arguably gaining importance. For example, data from comScore and Mintel infer that the number of unique internet visitors has risen from 55 million per month in 2008 to almost 70 million in 2011. The means in which tourism-related information is circulated and the way people plan for and consume travel has been deeply transformed by the Internet (Buhalis and Law, 2008; Senecal and Nantel, 2004; Gretzel et al., 2000; Xiang and Gretzel, 2010).

Therefore it is pertinent to evaluate the current research and theoretical framework associated with social media, in relation to tourism. The first key dimension to recognise is the shift from Web 1.0 to Web 2.0.

The shift from 'Web 1.0' to 'Web 2.0'

Prior to the latest incarnation of the Internet, Web 2.0, the Internet functioned solely in one direction - a "read-only" format (Borges, 2009). That is, published information was static and interaction with other Internet users and/or publishers was basically non-existent. When interaction was available, HTML was merely used to send *email* communications. Most websites are still Web 1.0 websites that exist for the primary purpose of providing content to be read but not interacted with (Borges, 2009: 35). The purpose of these websites is "to offer information about a company, organization, or person" (Borges, 2009:35).

Beginning in the mid-2000s, a new generation of websites emerged. These websites make up the latest version of Internet- Web 2.0 which primarily is propelled by user-generated content. Web 2.0 describes the Internet in its latest incarnation, which incorporates new developments to the Web, such as social media and social network sites (Brake and Safko, 2009). Schegg et al. (2008: 152) note that the evolution of Web 1.0 to Web 2.0 marks a shift from "users rather than organizations taking charge [of the Internet]." Thevenot (2007) expands on this notion, asserting that as social media rises in popularity, the general public gains more power as the authority of marketers and institutions declines. In relation to tourism, marketers and institutions no longer have ultimate control

over the image of their destination or product. Rather, anyone with access to the Internet has the freedom to contribute information to the subject.

TABLE 1 HERE

Table 1 summarises some major characteristics of Web 2.0 websites. Ultimately, Web 2.0 facilitates the integration of the following five functional properties: information representation, collaboration, communication, interactivity, and transactions (Gretzel et al., 2006: 147).

Kaplan and Haenlein (2009) argue that Web 2.0 is the natural next progression in the evolution of the Internet. The Internet essentially *originated* as a place, a Bulletin Board System (BBS), where users could exchange “software, data, messages, and news” (Kaplan and Haenlein, 2009: 60). In the 1990s, personal users could create homepages in a fashion similar to the way people today create blogs; corporate webpages were introduced in the mid-1990s and became common in the early 2000s (Kaplan and Haenlein, 2009: 60). Therefore, Kaplan and Haenlein (2009: 60) contend that social media brings the Internet “back to its roots” by creating a place for users to exchange information. But what do we mean by social media.

Defining and Understanding Social Media

Social media are a current and constantly evolving phenomena, it is important to understand how previous researchers have defined key terms and phrases. Wang et al (2002: 408) raise an important issue when explaining that the phrase ‘virtual community’ “is not hard to understand, but slippery to define. The same is true for social media, and terms used when discussing it.

The broad scope of the definitions of and surrounding social media highlight how precise researchers must be when defining their area of study and methodology. While several authors note a lack of a formal definition of “social media”, they consider the inclusion of consumer-generated content (CGC), shared online for easy access by other consumers integral to the definition (Kaplan and Haenlein, 2009; Stankov et al., 2010; Xiang and Gretzel, 2010). Brake and Safko, offer the following definition which offers a useful framework

Social media refers to activities, practices, and behaviours among communities of people who gather online to share information, knowledge, and opinions using conversational media. Conversational media are Web-based applications that make it possible to create and easily transmit content in the form of words, pictures, videos, and audios.

(Brake and Safko, 2009: 6)

Social media refers to “participatory”, “conversational”, and “fluid” online communities (Tuten, 2008). Qualman (2009) notes that sometimes the terms social media and Web 2.0 (or “Web 2.0 applications”) are used interchangeably, which is likely due to both having a large emphasis on user-generated content (Buhalis and Law, 2008; Buss and Strauss 2009; Ruzic and Bilos, 2010; Schegg et al., 2008; Xiang and Gretzel, 2010). Essentially, social media builds on “the ideological and technological foundations of Web 2.0...and allow for the creation and exchange of user generated content” (Kaplan and Haenlein, 2009: 61).

Figure 2 seeks to expand and develop the scope of social media as it highlights many examples of social media. Through social media, people interact and communicate for a range of reasons, in a variety of platforms- via writing blogs (e.g. Wordpress or Blogspot), social networks (e.g. Facebook), sharing videos or pictures (e.g. YouTube or Twitter), contributing to online forums and reviews (e.g., Tripadvisor and Amazon), posting news articles (e.g. Digg), accessing information provided by numerous contributors (e.g. Wikipedia), or micro-blogging (e.g. Twitter). In 2008, social media was the most popular activity on the web, a position search engines have never held, and pornography had never, until that year, lost (Qualman 2009: 1). In 2009, four of the top ten visited websites were social media websites, compared to zero in 2004 (Schetzina, 2010b).

Social media is often associated with youth, but users of all ages are quickly joining social media websites as market intelligence studies constantly affirm (Pew Internet and American Life Project 2011). As their research suggest that social media is rapidly transitioning from a youth fad to a widely used Internet tool and pastime and contributing to the development of social networks and virtual communities.

According to Powell (2010) the term social network is sometimes used interchangeably or in conjunction with social media and is not limited to websites as it has existed longer than the Internet and simply refers to “a community in which individuals are somehow connected—through friendship, values, working relationships, or ideas” (Powell 2010: 1). More specifically Boyd (2008) classifies “social network sites” as websites that allow users to create some sort of a profile, list users they connect with, and view others’ connections. These types of websites (such as LinkedIn, MySpace, and Facebook) form a significant portion of Web 2.0 applications usually included in the term social media which have become significant elements with tourism destination marketing

Social Media and Tourism

Social media is particularly relevant since tourism is an “information-intensive industry” (Gretzel et al., 2000: 147; Wang et al., 2002). A significant portion of the current published research on social media and tourism identifies where consumers obtain information to assist the trip-planning process and the types of Internet content accessed to make informed decisions about destinations, accommodation, restaurants, tours, and attractions. (Chung and Buhalis, 2008; Ruzic and Bilos 2010; Thevenot, 2007; Xiang and Gretzel, 2009). Ruzic and Bilos (2010) reiterate that social media websites “dominate the internet” and they “have become an integral part of the travel planning process” (Bilos 2010: 181). Xiang and Gretzel (2009) support this view that social media are becoming more critical in a traveller’s trip planning process. Litvin et al. (2005) discovered that *official* restaurant webpages did *not* play a role in consumers’ restaurant decision-making yet it could also be argued that consumer-generated content is of more importance than officially produced web content. However, both studies have limitations. Litvin et al.’s list of questionnaire response options was limited, not including guidebooks, consumer reviews, social media, or other advertisements. Xiang and Gretzel (2009) study mimics probable travel searches, but they do not necessarily reflect how actual travellers go about planning their trips.

Senecal et al. (2004) claim that consumers are more likely to purchase a product after consulting the Internet for recommendations. Tourism experiences are intangible and therefore unable to be evaluated prior to consumption; thus, personal recommendations are even more influential (Buhalis, 1998; Gretzel et al., 2000; Litvin et al., 2008).

Travellers, in particular, prefer to rely on other travellers’ advice, versus guidebooks and standard print advertisements (Casalo et al., 2010). As a result, travel companies such as Lonely Planet developed their own online travel communities to engage consumers in conversations about travelling (and presumably, to become loyal to the Lonely Planet

brand). Wang et al. (2002: 407) affirm that these types of travel communities, including non-firm hosted ones, will “gain importance in the future,” which has certainly emerged since 2002. However, relying solely on consumer reviews and websites such as Tripadvisor have their own limitations. Whilst Chung and Buhalis (2008: 272) attribute the popularity of online travel communities to the ability to gain “trustworthy reviews,” much of the information on the Internet may not be accurate or reliable. In spite of the research dedicated to social media and trip planning, a 2010 World Travel Market poll found only one-third of British citizens using social media to plan their vacations. Consequently, though consumers may be faced with a plethora of social media websites and information when planning holidays, the effects of and use still remains unclear (Buhalis and Law, 2008; Schegg et al., 2008) in relation to tourism marketing.

Social Media and Tourism Marketing

The relationship between social media and *tourism* marketing, specifically the ability of social media to increase awareness and generate interest in tourism destinations and products has not attracted a major research impetus even though trip planning and tourism marketing via social media are interrelated. Social media at their core are about engagement; they allow for easy, quick communication, collaboration, education, and entertainment (Brake and Safko, 2009: 8). The line of communication is no longer limited to producer-to-consumer, but can be consumer-to-consumer, and consumer-to-producer, as well as many-to-one, one-to-many, one-to-one, or many-to-many. Accordingly, marketers are able to use social media to try to stimulate conversation, encourage interaction, and create “buzz” in ways that traditional marketing strategies are unable to. Consequently, this “buzz” generates interest and influences the decisions consumers make when planning trips.

Figure 5 here

Tuten (2008) outlines many ways in which social media can provide promotional opportunities for brands, or in the case of DMOs, destinations and Figure 5 illustrates these methods.

Though social media can, in many ways, function very similarly to other forms of marketing tourism marketers are failing to realize the uniqueness of Web 2.0 if they simply use social media to implement traditional advertising strategies. For example, if organisations solely post online to persuade consumers to purchase products or services (Parise, Guinan, and Weinberg, 2008) they are unlikely to influence consumers. Instead, marketers should engage and *involve* the consumers. This can be by including them in product development, requesting feedback, or maintaining successful customer service (Parise et al, 2008). This involvement can be vital to developing loyalty, generating interesting content and increasing awareness.

A term used in both social media and marketing literature that is essential to a discussion of social media marketing is word-of-mouth, or WOM (also referred to as “social media marketing”, “guerrilla marketing”, or “buzz”). Though WOM marketing was conceptualised before the Internet, “the Internet’s accessibility, reach, and transparency” and the emergence of technologies that easily facilitate consumer-to-consumer interaction are greatly influencing WOM (Carl and Noland, 2008; Kozinets et al. 2010: 71; Litvin et al., 2008; Trusov et al., 2009). WOM exists due to the desire to share, and is usually originated by “opinion leaders” or “early adopters” and is not limited to the spread of positive information (Litvin et al., 2008).

The advent of social media and the shift from Web 1.0 to Web 2.0 also marks the shift from word-of-mouth to what Qualman (2009) terms *world-of-mouth*. For example, while the

radio took 38 years to reach 50 million people, TV took 13 years to reach 50 million people, and the Internet took four years to reach 50 million people and Facebook added over 200 million users in less than one year (Qualman, 2009: 262). Though Xiang and Gretzel's (2010) research dealt with the trip planning process, they declare that the results suggest tourism marketers are in jeopardy of becoming irrelevant if they ignore social media. Likewise, several other authors also cite the importance of adopting social media practices in tourism marketing (Gretzel et al., 2000; Hjalager, 2010; Ruzic and Bilos, 2010; Schegg et al., 2008). However, little evidence and academic research exists of how tourism organisations or businesses are actually making efforts to utilise social media.

DMOs and Social Media

Gretzel, Fesenmaier, Formica, and O'Leary (2006) highlight six important challenges destination marketing organisations would face in the near future. The first challenge, and arguably, most imminent was adapting to technological change (Gretzel et al., 2006). According to focus group and expert panel research DMOs are concerned about where to "find the time, the money, and the staff to keep up with technological changes while maintaining regular tasks and responsibilities" (Gretzel et al., 2006: 118). Yet using the Internet to market destinations is not new. DMOs have had websites and purchased online advertising for many years. But the Internet has evolved with the arrival of Web 2.0 and the rise of social media. In 2008, social media was used by 75% of all Internet users, a 19% increase since 2007 (Forrester Research, cited in Kaplan and Haenlein, 2009). Consequently, organisations that use social media are likely increase their chances of capturing the attention of Internet users.

In a study investigating national tourism organisations (NTOs) use of social media, Stankov et al. (2010) argued that they are “beginning to realize the importance of using the power of social media,” but through their content analysis, found that less than half of the 39 NTOs in the European Travel Commission were officially represented on Facebook. These findings seem low, not because a presence on Facebook is vital to an NTO, but because social media services, like Facebook, are relatively simple to use, free, and potentially very powerful.

Nonetheless, marketing via social media seems to be what is most relevant to the way in which tourism is utilising social media. For example, JetBlue Airways announces fare specials, delays, and news via Twitter to its over 1.5 million followers (Schetzina 2010b). In 2010, VisitDenmark launched a multi-platform social media campaign combining the use of Twitter, Facebook, and YouTube to raise awareness of Copenhagen as a “city-break” destination, specifically targeted at the US market (TravelPulse.com, 2010). In 2010 Tourism Queensland combined social media and traditional advertising strategies via the “Best Job in the World” competition, receiving over 35,000 applicants via YouTube (Islandreefjob.com.au, 2009; Nicholson, 2011). Even so, success of these and similar initiatives is difficult to measure and it is unclear if social media marketing campaigns can function on their own, without help from traditional advertising outlets such as print, television and radio. For this reason attention now turns to DMOs and social media as a focus for this research study.

However, few companies or organisations in tourism are comfortable using social media. This may be because they do not fully understand the new technologies, or because they

may feel vulnerable to the fact that social media allows users to “speak so freely” about their businesses or organisations (Kaplan and Haenlein, 2009: 60) because this may damage their reputation. The shift from the Web to Web 2.0 is largely characterised by users and consumers gaining control of the Internet (Thevenot, 2007). In the past, businesses had the sole authority over what kind of information existed about them on the Internet through official websites and press announcements. This is no longer the case as Kaplan and Haenlein suggest:

...if an Internet user types the name of any leading brand into the Google search, what comes up among the top five results typically includes not only the corporate webpage, but also the corresponding entry in the online encyclopaedia Wikipedia. Here, for example, customers can read that the 2007 model of Hasbro’s Easy-Bake Oven may lead to serious burns on children’s hand and fingers due to a poorly-designed oven door, and that the Firestone Tire and Rubber Company has been accused of using child labor in its Liberian rubber factory.

(Kaplan and Haenlein, 2009: 60)

This implies that the information a user obtains when conducting a simple Internet query is exceedingly diverse and from a variety of sources while having service implications for the online reputation and branding of the organisation.

A situation similar to the one outlined by Kaplan and Haenlein (2009: 60) is particularly relevant to DMOs. For example, when potential travellers search about destinations, users will also encounter those destinations Wikipedia entries, which may contain information

such as terrorist attacks, natural disasters, or a number of other types of information that the DMOs would not prominently advertise such as crime, racial issues and political tensions and conflict. Of course, Wikipedia is not the only site where users casually converse about businesses, products, and destinations. These conversations are happening all over the Web on sites such as Twitter, Facebook, and Tripadvisor, too. Therefore with these issues in mind, attention now turns to the rationale for this study.

Social Media, Tourism Marketing and DMOs: The Research Problem

In the current economic climate of public austerity NTOs and more localised tourism boards, as publicly funded organisations, are losing funding, offices and the ability to market as widely as they did previously. VisitBritain is a good example as it lost 34% of government funding in late 2010 and was forced to cut 70 jobs and close 14 overseas offices (Conte, 2011; Johnson, 2011). Conversely, social media is, without a doubt, rising in popularity. The vulnerability of tourism boards and rise of social media are not entirely unrelated. Social media is often exalted for its relative low-cost and global reach. So, unsurprisingly, in response to the budget cuts, Sandi Dawe, chief executive of VisitBritain asserts:

We will use new technology including our award-winning suite of multi-lingual websites, social media platforms and international public relations expertise to maintain our global footprint, as well as a staffed presence in key locations.

(Dawe, cited in *The Independent*, 2010)

But VisitBritain and other NTOs relatively recent interest in using social media as a destination marketing tool indicates that an examination of if and how these two situations- NTOs under financial pressure, and social media on the rise- influence each other is a significant area to study.

Travellers in 2011 insist on being in control, and understanding the new, “Internet-savvy traveller” will be almost certainly be critical for long-term success in tourism (Schegg et al., 2008: 160). Companies, business, and tourism organisations that do not adopt social media will lack a competitive advantage (Schegg et al., 2008; Stankov et al., 2010; Wang et al., 2002). Current campaigns and initiatives suggest that tourism organisations are beginning to study social media and develop strategies to use it to their advantage. However, what could be more detrimental than not understanding or adopting social media practices is using such practices in a poor manner (Schegg et al., 2008; Wang et al., 2002).

Thus, a clear understanding of why and how social media function is vital to applying it appropriately to tourism destination marketing. One sizeable gap in the existing literature is research examining the use of social media by tourism destination marketing organizations. According to a 2003 Pew study, 44% of US Internet users had contributed something (such as writing, photos, or videos) to the online world. However, while participating in social media forms a substantial percentage of internet usage today, and that tourism sales and promotion heavily rely on the Internet, little research has been conducted to study how tourism entities are evolving with the Internet and using social media to market destinations and engage with potential consumers.

Current research is largely focused on consumer reviews (made popular by Tripadvisor), travel blogs, and search engines. Furthermore, much of the research on social media is

conducted through self-reported questionnaires. Consequently, there is a lack of objective analysis of exposure to and usage of social media platforms related to tourism. Xiang and Gretzel (2010) echo this fact noting that “the extent to which social media constitute the online tourism domain is not well understood in an objective, comprehensive way.” With these issues in mind, attention now turns to the most appropriate research methods to adopt towards this study.

Research Methodology

This study is exploratory in nature and adapts an inductive approach. Veal (2006) explains that descriptive research is a common method in tourism research largely due to “the newness of the field and the changing nature of the phenomena being studied.” This research seeks to describe the nature and degree of the usage of social media among the marketing organisations of popular tourism destinations in 2011. A comparative approach was also integral to this study given the number and variety of countries’ DMOs being studied. Comparative research studies in tourism research still remain the exception rather than the rule and Pearce and Butler (1993: 21) define comparison as “the process of discovering similarities and differences among phenomena.” A comparative approach not only enables the researcher to draw out similarities and differences, but also allows the researcher to “go beyond description toward the more fundamental goal of explanation” (Hayne and Harrop, 1982: 7 cited in Pearce and Butler, 1993: 21).

A comparative approach is generally adopted for practical purposes and used in studies that seek to recommend solutions and provide useful explanations (Pearce and Butler, 1993). Comparative studies allow the subjects being researched to “transfer experiences and learn from others” (Pearce and Butler, 1993: 32). The comparative approach is

particularly suitable for this study as the study deals with several countries and new technologies.

The principal focus of research in this study includes data collected from content analysis and semi-structured interviews with DMOS. Though the research utilises two research methods, they are both utilised to address the same main research objective: to examine in what ways, and for what purposes, DMOs are strategically employing social media to market their destinations and secondary sources (e.g. market intelligence and industry reports) assist in the translation process to help benchmark performance and the effort of social media in DMO marketing. While quantitative research allows for statistical analysis, qualitative research allows for the collection of “relatively detailed information about relatively few cases” (Veal, 2006: 99). By employing both quantitative and qualitative methods, this research seeks to gain a well-rounded analysis of use of social media among national DMOs. The following section will thoroughly outline and justify the two selected research methods.

Quantitative Research of Social Media

Quantitative research was chosen as the primary research method for this study because it was the most appropriate research method to achieve the research aim of classifying, measuring and analysing how top national tourism authorities are utilising social media to engage consumers and market destinations. The descriptive nature of this research aims to analyse and interpret existing material to better understand the state of the social media usage among DMOs of top tourism destinations. For that reason, quantitative analysis was

chosen to incorporate as much data and scope as time allowed, and for that data analysis to be as objective as possible in relation to the use of a content analysis approach.

Content analysis is the preferred research method for this type of study as that it allows the researcher to “use a set of procedures to make valid inferences from text” (Weber, 1990.) Social media, even in 2011, are relatively new, so it was hypothesised that the way and degree with which organisations, in this case, DMOs, utilise social media as part of their marketing efforts would vary considerably. Information, posts, tweets, blog entries, and other forms of content exist freely on the web, but due to the relative infancy of the technology, there is comparatively little research to assess, explain, or even examine these forms of marketing, advertising, and business-to-consumer interactions. A content analysis is the most appropriate research method since “the pursuit of content analysis is fundamentally empirical in orientation, exploratory, concerned with real phenomena, and predictive in intent” (Krippendorff, 1980: 9).

The content analysis in this study is used to “describe trends in communication content” (Berelson, 1952, cited in Weber, 1990: 9) and Figure 7 outlines the three main analytical tasks required after the inference stage of a content analysis (Krippendorff, 1980: 109). Typically, these tasks are not performed separately from each other, but happen simultaneously (Krippendorff 1980: 109). These techniques are also not unique to content analyses but it is highly relevant to a comparative method to identify variations and similarities to social media used by NTOs and platforms they use to communicate their message.

Figure 7 here

When choosing which social media platforms to analyse for this study, Twitter and Facebook were both obvious candidates. Both websites have millions of users, a strong participation from companies and organisations, and differ widely in services, reach, and usage. Furthermore, undertaking a pilot study, it became clear that the most common social media accounts for DMOs to participate in were Facebook and Twitter (and less often, YouTube.) Therefore, in an effort to analyse as much data as possible from the DMOs on consistent platforms, Twitter and Facebook were selected which are now examined in detail to provide a context for the research.

Facebook, launched on February 4, 2004, “enables users to present themselves in an online profile (using text, pictures and video, gather “friends” who can post comments on each other’s pages, and view each other’s profiles” (Stankov et al., 2010). Currently, Facebook has over 750 million active users, 50% of which log on to the website daily (Facebook, 2011.) Facebook is available in over 70 languages, and 70% of users reside outside of the United States (Facebook, 2011). The sheer personal usage and popularity alone make Facebook a suitable candidate for a study of social media use as businesses and organisations create and maintain an official presence on a social networking website such as Facebook to allow their consumers (and potential consumers) to easily connect to them.

Twitter is a micro-blogging website that was launched July 13, 2006 (Jansen, Zhang, Sobel, and Chowdury, 2009). Micro-blogging can be characterized by short messages,

immediate delivery, and the ability to subscribe to certain updates (Jansen et al., 2009). Via Twitter, users can send 140-character messages, called “tweets,” that answer the question “What’s happening?” (Schetzina, 2010b.) Schetzina (2010b: 3) notes that this prompt- “What’s happening?”- is “more inclusive” than the original prompt- “What are you doing?” This is significant because since its creation in 2006, Twitter has grown beyond personal updates to encompass news, advertising, and other various forms of engagement.

According to July 2011 statistics, with over 175 million users, Twitter is by far the most popular micro-blogging website (Twitter.com, 2011). However, this number is disputed as presumably, many accounts are left unattended (Carlson, 2011). Unlike Facebook, Twitter does not share its monthly or daily number of users, so there is quite possibly a huge discrepancy between the number of total “users” and the number of daily or monthly users (Carlson, 2011). Twitter allows users to send updates (called “tweets”) of 140 characters. These tweets can be read, depending on the users’ privacy settings, by the public as well as that users list of subscribers (called “followers.”) Whereas most “friends” on Facebook have met off-line, prior to participating in the Facebook network online, it is common for users of Twitter to “follow” accounts of those they have not met in real life, such as celebrities, bloggers, new organisations, comedians, or other personal users with whom they share similar interests (Ross et al., 2009 cited in Stankov, 2010). While Twitter was originally mostly popular with personal users, as the website has grown, it has gained the attention of many companies, organisations, and news services (Jansen et al., 2009). These organisations see Twitter as a new, groundbreaking way of reaching out to, interacting with, and understanding the consumer behaviour of millions around the world.

Given its popularity, influence and usage by both consumers and businesses, Twitter was an important site to examine in this research.

Sampling Process

The content analysis for this study analysed data from seven tourism boards' official Facebook pages and Twitter accounts. Figure 8 illustrates the process by which the sample countries and corresponding Facebook and Twitter accounts were selected. The countries were chosen according to the top ten international tourism destinations as indicated by the United Nations World Tourism UNWTO Tourism Highlights 2010 Edition. The rationale behind choosing the top ten international destinations was because these destinations have well-established, national level DMOs in place, in most cases, globally. These DMOs have been marketing their countries, and cities, regions, and attractions within those countries, for years. Many have begun to adopt digital marketing strategies. Most DMOs have expanded their efforts to include adopting social media platforms as part of their marketing efforts. Furthermore, the selection of DMOs encompasses a range of countries, continents, and types of holiday and business destinations. This in turn provides a diverse sampling frame for the content analysis.

Figure 8 here

The selection of countries, however, presented a few minor problems. Firstly, though the United States is ranked in the top ten, there is no national tourism body for the entire country. Rather, tourism organisations operate in each state. This would skew the data, since analysis of one state's social media initiatives would not be representative of the country as a whole. Moreover, were a single state to be chosen, the USA would remain

the only destination in the top ten selected without representation in London, thus prohibiting face to face interviews as were conducted with the other interviewed DMOs.

Secondly, no Facebook or Twitter activity could be found for two of the top ten destinations- China and Italy. As both Twitter and Facebook are restricted in China, this was to be expected. Nevertheless, efforts were made via multiple emails and phone calls to contact both the Chinese NTO to confirm the lack of official social media accounts but to no avail. In contrast, Italy did confirm their lack of social media marketing initiatives, but provided no explanation for this lack of participation. Finally, some tourism organisations operate multiple Twitter accounts and/or Facebook pages for each office. For example, Spain has a general Twitter account, operated from Madrid for all audiences as well as an account operated from the London office and geared specifically to those in the UK. Determining which accounts to analyse in situations like these varied depending on the circumstance. Posts and tweets from 1 June to 30 June 2011 were analysed. This length of time was selected due largely to feasibility of categorising a substantial amount of data. The month of June was selected to be the timeframe for the content analysis is because in many countries, June marks the start of the summer holiday season in Europe. For this reason, DMOs are assumedly busy marketing their destinations to appeal to summer holidaymakers and travellers. It was hypothesized that the busy summer season would require increased marketing initiatives and hopefully provide a large and diverse sample of social media content to analyse.

Content Analysis: Categories for Coding

Defining reliable categories for a content analysis is crucial. Content analyses become problematic and unreliable when categories or variables are invalid. Categories are only valid “to the extent that they measure the construct the investigator intends [them] to measure” (Weber, 1990: 15). When creating variables for this study, it proved beneficial to use broadly defined categories with more specific sub-categories. This enabled the data to be analysed in multiple ways after the research was conducted. Content analyses can code words, word senses, sentences, or themes (Weber, 1990: 22). Due to the short nature of Facebook posts and 140-character limit to tweets, this study codes entire posts or tweets, usually between one to three sentences.

To determine appropriate categories, several weeks were spent examining the Twitter feeds and Facebook pages of many national tourism organisations to develop an understanding of the types of content, information, and engagement they were producing. This pilot study determined what categories would be relevant, and worth further investigation, to the content analysis. Table 2 lists the categories used to code data. Categories were not mutually exclusive; any tweet or Facebook post could be classified in a variety of categories. Naturally, some categories proved to be more common and widespread than others. Nonetheless, the categories did allow for a broad exploration of how, and for what purposes, DMOs are using social media.

Table 2 here

Though the content analysis of DMOs primary social media platforms (Twitter and Facebook) provides an understanding of how these platforms are employed, it does not for example, give any weight to how readers absorb or respond to the information.

Furthermore, this content analysis fails to give insight to strategies surrounding these

types of social media. For these reasons, this study also used interviews as a second form of research to contextualise and assist in the understanding of NTO use of social media.

One important element of this particular content analysis was measurement of the number of replies. This was easily tracked and analysed on Facebook, but not via Twitter. On Twitter, a general user is unable to view all replies sent to a particular user unless those replies are sent from users that the coder is following. For this reason, this study was unable to obtain an accurate number of comments that resulted from tweets from the DMOs. However, it is possible to track retweets- the term for the action when one user posts the verbatim message of another user, similar to the forwarding function in emails. Facebook offers a similar function where users can “like” other members’ posts. Therefore, these two elements could serve as comparison in this study. Lastly, the categories defined in this particular content analysis allowed an analysis of how tourism organisations are practically using social media, for instance, the nature of the tweets and posts, frequency of those posts, and reason for the posts. It did not allow for much examination of the actual language and emotion for marketing and promotional purpose of the posts. The content analysis was also accompanied by a qualitative research process involving face to face semi-structured interviews.

Qualitative research provides complementary insights to quantitative research to gain an understanding about how DMOs social media strategies are spoken of and conceived versus how they are actually executed. This study focuses on marketing strategies and qualitative research proved particularly useful in understanding discrepancies between what the tourism-marketing professionals *believe* is happening and what is *actually* taking place. In order to determine the most appropriate interviewees to be selected, tourism boards were contacted via email and phone to find an employee in the most relevant department (most often digital media or marketing). Six of the seven tourism boards

analysed in the content analysis participated. Those included Visit Britain, Tour Spain, the German National Tourist Board, Visit Mexico, the Turkish Ministry of Tourism and Culture and the France Tourism Development Agency. The only tourism board with presence on Facebook and Twitter that did not agree to participate in an interview was Tourism Malaysia. For reasons of employee anonymity, no names are disclosed only the tourism organisation.

All interviews were conducted in-person, at the London office of each tourism organisation and interviews lasted 1-1.5 hours. Interview questions were designed to gain additional insight that the content analysis could not provide, but also allowed room for the interviewee to contribute any information they deemed relevant to the use of social media to market tourism destinations. In addition to interviewing the six DMOs of the top ten most visited destinations, a representative from the Public Relations agency that maintains the social media accounts and effort for Tourism Queensland (Australia) was also interviewed. The rationale behind this was to provide insight and information from a DMO renown for its marketing efforts and cutting-edge social media campaigns.

Interviews were semi-structured and sought to gain understanding of how and why certain social media initiatives are (or are not) chosen and implemented. A list of open-ended questions was formulated pertaining to this objective, though any additional, relevant information from the interviewee was accepted and information from each authority, of course, varied. During the interview, the researcher typed notes, or verbatim sentences, on a laptop. Seven interviews were deemed a valid number for inclusion in this research because the interviews were relatively in-depth and covered a broad area of questions

related to social media and the DMOs. Seven interviews provided very detailed information to enhance the results obtained from the content analysis.

Table 3 presents the questions asked to all interviewees. These questions were structured enough to gain a broad understanding of the organisation's social media strategy, but also allowed for the interviewee to interject with any additional information they felt relevant to the subject.

These interviews were undertaken towards the end of June and into early July 2011 so as to derive a comprehensive understanding of the interviewees' respective DMOs social media usage. It also meant that questions could be specifically tailored to that DMOs particular social media strategy. Moreover, issues that needed clarifying could be resolved during the interviews. The first interview took place June 29, 2011 and the last was conducted on July 26, 2011. As with any interview process, the qualitative nature and politics of each organisation sometimes resulted in questionable validity, subjective opinions, or biased responses from interviewees. This though, is complemented by the content analysis, which attempts to provide a more objective analysis.

Conducting all interviews in-person avoided any problems in equivalence, i.e., some interviews being conducted in person and some via telephone or email. Ultimately, the data gleaned from the interviews and the data collected from the content analysis combined to develop a comprehensive representation of the use of social media among the tourism organisations.

Findings and analysis

As shown in Table 4, the dates at which DMOs of the top ten most visited international destinations established Twitter accounts varies. The earliest adopter, Malaysia, established a Twitter account in November 2008, yet Turkey did not establish an account until June 2011.

The date at which each DMO joined Twitter does not directly correspond with the number of followers. While it might be argued that DMOs managing a Twitter account for a longer period of time would have more followers, this is not always the case. For instance, Germany established a Twitter account within days of Malaysia, but has over 50,000 fewer visitors. It is likely that while some organisations actively manage and grow their social media endeavours, other organisations simply join because social media is a current trend, but perhaps lack the support, knowledge, or interest to maintain the accounts effectively.

Table 4 here

The dates at which the DMOs signed up for Twitter accounts are somewhat clustered. Three of seven of the DMOs joined in the autumn/winter of 2008. In 2008, Twitter had existed for just over two years. In the autumn period in the UK World Travel Market, a leading global event for the travel industry and business-to-business relations, takes place in London. It is quite possible, that the 2008 World Travel Market featured a seminar or presentation on social media, leading to the adoption of Twitter as a marketing strategy by several DMOs.

Table 5 describes the basic Facebook statistics for the selected DMO Facebook accounts. These figures demonstrate that like the Twitter accounts, the date that the DMOs joined

Facebook does not directly correspond with the number of Facebook fans. This is expected as it could be argued that DMOs view joining and exhibiting a presence, no matter how inactive, on social media sites as more important than the actual maintenance of the site, the frequency with which they post, and the quality of the content distributed. Hay (2011: 10) postulates that businesses have to appear to be keeping up with the times- “to be seen in touch with Zeitgeist.”

Table 5

According to Kaplan and Haenlein (2009: 59), “social media represent a revolutionary new trend that should be of interest to companies operating in online space- or any space, for that matter.” Kaplan and Haenlein suggest that social media should be an integral part of any company’s marketing strategy. The sample of DMOs researched in this study confirms that social media is of interest to DMOs, or at least suggests that it is becoming more prevalent. Of the top ten most visited international destinations, the majority (seven) of DMOs responsible for marketing those destinations maintain Twitter and/or Facebook accounts.

Those that do not maintain Twitter and/or Facebook accounts are Italy and China. No explanations for the lack of use of social media by the Italian and Chinese Tourist Offices were acquired. However, it is assumed that the reason for no Facebook or Twitter use by the official China National Tourist Office (CNTO) is due with the fact that both websites are banned in China. It remains unclear if any other Chinese social media platforms are utilised for marketing purposes. The Turkish Ministry of Tourism and Culture is the only

DMO of the seven with presence on Facebook and/or Twitter to not utilise *both* platforms.

The Turkish Ministry of Tourism and Culture information officer Nilay Asili (2011) explained that this was simply because “Twitter has more reach” and that plans to launch a Facebook page were underway. While new technologies undoubtedly alter the way we live and work, it often takes a considerable amount of time for society to learn what that technology is capable of (Borges, 2009).

Social Media Strategies employed by NTOs

From the data analysed from the DMO posts, three main themes guided their social media strategies: post frequency, interaction, and content. On Facebook, users primarily connect with people they know in real life. On Twitter, however, it is very common for users to follow users whom they have never met, such as celebrities, businesses, political figures, or news organisations. Twitter is centred on microblogging- short (mostly) textual “comments delivered to a network of associates” (Jansen et al., 2009: 2170). Facebook, on the other hand, is much more multifaceted; users can upload pictures and videos to photo albums, communicate privately to other friends, and post information for their entire network to see. Both sites are non invasive, as users choose a network of users from whom they wish to receive updates.

Table 6 shows that the average number of daily posts on Facebook is 0.73 compared to 2.52 daily Twitter posts a day. This aligns with the general public’s use of the two platforms- 12% of Facebook users update their status each day, whereas 52% of users on Twitter post daily (Ingram, 2010). Status updates are more integral to the purpose of

Twitter, for businesses and individuals alike. One reason that organisations tend to update Facebook less frequently is loyalty to the consumer. Senecal and Nantel (2004: 159) suggest two major benefits to online personalisation for retailers: the ability to “provide accurate and timely information to consumers” and the ability to “increase the level of loyalty” consumers hold for a certain brand. These two benefits are particularly applicable to Twitter and Facebook respectively. While Twitter is driven by and excels at providing timely updates, Facebook is a good platform to employ to increase consumer loyalty.

Table 6 here

This suggests that there are different strategies being employed by NTOs. For example, The interviewee at VisitBritain, cites consumer trust as the most important guiding factor to managing Love UK, VisitBritain’s official Facebook account. “If you [update Facebook] too much, you find that people are actually pulling out of it” explains the interviewee from the French Government Tourist Office in London. According to the VisitBritain respondent loyalty to the consumer is much less of an issue on Twitter as they do not “massively believe in Twitter” and thinks it is basically “a lot of noise.” Conversely, the German National Tourist Board does not differentiate between the two platforms. Each message posted to Facebook is replicated on Twitter (as many external dashboard applications used to integrate multiple social media clients include the option to do this automatically).

Due to the constant status updates on Twitter, any given user’s feed is constantly refreshing. Thus, many tweets get “buried” very quickly. In fact, 92% of retweeting and replying to tweets occurs within one-hour of when the original tweet was posted (Geere,

2010). This suggests that after one-hour, very few people will view the tweet.

Consequently, to ensure tweets will be viewed, it is almost crucial to update frequently and timing is of the essence. Hay (2011: 6) refers to this as the “scatter gun approach.” On Twitter, businesses do not have very much information about their followers; instead, they bombard them with a variety of information hoping that something will be of interest. Hay (2011: 6) notes that though this approach is not commonly used in other marketing strategies but it is deemed suitable for Twitter by DMOs due to the “low entry costs.”

The frequency with which each DMO posts to each individual platform also varies, and can be attributed to several factors and strategies. Figure 9 indicates that VisitBritain accounts for 66% of the total monthly tweets of the combined DMOs, clearly skewing the total number of tweets for all DMOs in June. This is because; VisitBritain has a different tactic than the other DMOs. An important category of the content analysis was whether or not the analysed posts contained original information versus information that had been provided previously (within the month of June).

Figure 9 here

Figures 10 and 11 represent the frequency with which VisitBritain publishes repeated content in comparison to the other DMOs. Of VisitBritain’s 349 total tweets, only 52% provided original information. The other 48% of tweets were retweeted previous tweets (in the month of June 2011) or provided the same information as a previous tweet in June, though not verbatim. Presumably, this number would be even higher if the content analysis was conducted over a longer period of time.

Figures 10 and 11 here

Figure 12 and 13 demonstrate that there is no general pattern of how many times the combined DMOs post per day. It is apparent that DMOs contribute much more often to Twitter, although some DMOs have more systematic strategies to how many times per day they post.

Figures 12 and 13 here

As Figure 14 shows, the Spanish National Tourist Office tweets roughly once a day, with the exception of tweeting twice on one day in June, and not tweeting at all on eight days of the month. In contrast, VisitBritain's daily tweets were much less consistent, ranging from 1 to 29 per day during the month of June. The frequency with which DMOs post and the overall total they post per month is only one important element of their social media strategies. Another key element is to what extent the DMOs use their social media platforms to interact and engage with their consumers.

Figure 14 here

Interaction with Consumers

In researching the challenges that face DMOs, Gretzel et al. (2006) found that many DMOs understand the Internet to be a substitute for pre-existing technologies, and use it as such. According to Gretzel et al. (2006: 118), "Web sites have not *replaced* call centres, rather, Web presence often *drives* phone inquiries." The Internet, and social media, are

additional tools to be used in conjunction with, not as a replacement for, older strategies. Though most interviewees cited “interaction” and “engagement” and even “informality” as the major benefits of utilising social media, the content analysis suggests a different pattern. While traditional marketing practices, such as advertising a specific event, can and do elicit responses via social media, social media allows much more than simply replicating other marketing strategies on a new technology. Facebook proclaims that their platform is about “giving people the power to share and make the world more open and connected” (Facebook.com, 2011). However, this sort of sharing more likely happens on a personal level. Companies, on the other hand, are often less comfortable with consumers voicing their opinions and ideas, and frequently use the site to advertise and promote as they do in other forms of media. This research suggests that DMOs typically use social media, in this case, Facebook and Twitter, to simply advertise and market via an additional medium, changing little about the content of type of message.

For example a tweet by the German National Tourist board on 16 June 2011 (The Open Air Castle Festival), which advertises a weeklong festival in a German town illustrates this point. Whilst there were multiple ways to advertise festivals and events before the advent of social media, this is a good example of using social media to implement traditional, pre-existing marketing methods. While Twitter followers of the @GermanyTourism account could easily reply to this tweet, it is not classified as “interactive” for the purpose of this research. “Interactive” was defined as a category for use in the content analysis as a post that directly asked a question or requested some form of response.

An interactive post that the German National Tourism board (We do like sausages. What about you? What is your favourite sausage?) deemed particularly successful when interviewed, found the respondent explain that “simple questions work well” and explained that this simple question: ‘what’s your favourite German sausage?’ garnered “more responses than anything else ever before.” Over the course of June 2011, some DMOs contributed considerably more interactive content than others. But across both platforms, the majority (88.2%) of posts were not interactive in nature.

Table 7 displays the degree of interactivity of each DMOs posts on Facebook and Twitter. DMOs, such as, the French and Spanish tourism boards, demonstrated similar levels of interactive posts on both platforms. Others, such as the British and Mexican tourism boards were much more interactive on Facebook than they were on Twitter. The only tourism board to have a higher percentage of interactive posts on Twitter than on Facebook was the Malaysian tourism board. However, on both platforms the number of interactive posts was very few, so this finding is insignificant. There are a number of reasons to suggest that the level of each DMOs interactivity on Facebook versus Twitter is not coincidental, but strategic.

Table 7 here

Figure 17 and 18 demonstrate that postings on Facebook were over three times more interactive than updates on Twitter. This finding can be attributed to a number of factors. As “interactivity” is about the DMO *directly* posing a question or requesting feedback, content, or input from the audience, it is important to try to assess comments and responses. These are significantly easier to track and organise via Facebook than on Twitter. Twitter organises all “mentions” (the nearest equivalent of a Facebook comment) in one pane. They are not, like Facebook, easily categorised by posting, but instead, by the time the comment was posted. For businesses, this complicates being able to easily comprehend and measure feedback.

Furthermore, Twitter does not allow users to easily view comments from other users whom they do not follow. While the user to whom the comments are directed, in this case the DMO, can always view replies, other users will not be able to unless they are following the user who has replied. On Facebook, all users participating or viewing the post, regardless of whether or not the users are “friends” with one another, can view comments. A retweet is the Twitter equivalent of forwarding an email- it simply re-posts information that has originated elsewhere previously. Most DMOs interviewed mentioned the ability to measure consumer sentiment via social media. The fact that of 27% all posts from six tourism boards during the month of June posts on Facebook were categorised as interactive compared to 8% of their posts on Twitter is likely strongly correlated to the simplicity of Facebook’s comment-tracking system.

Every DMO with both a Facebook page and a Twitter account has more “likes” on their Facebook page than followers subscribing to their Twitter updates. For instance, when the

Spanish tourism board posts something on Facebook, it reaches over 15 times as many people as when they post an update to Twitter. It reaches more people since given the frequency with which Twitter users update, each time a user logs in there are numerous updates (organised by the time in which they were posted) to scroll through whereas on Facebook, it is not uncommon to see all the updates from any given day. So, even though the DMOs are communicating to a much larger audience when using Facebook, it is easier to interact with this audience given the lack of saturation of other postings and organisation of the commenting system.

Using Facebook more than Twitter to engage consumers is a widely accepted strategy since, the respondent at Tourism Queensland observed that “more people have a Facebook account than would engage in a daily Twitter feed.” DMOs use Facebook much more interactively because they understand how to measure and evaluate consumer’s responses, inquiries, and criticisms. Consequently, this research proposes that less effort is placed on encouraging interaction on Twitter, as it is harder to measure and use effectively. Thus, Facebook is generally used as a conversational tool, Twitter is used as an advertising and information distribution tool. After analysing 1.2 billion tweets, Sysomos, a social media analytics company, found that 71% of tweets are not retweeted nor replied to (Geere, 2010). When compared to Twitter, Facebook is a much more interactive social media platform, and the content from the DMOs confirms this.

Table 8 illustrates that across all DMOs, the average number of “likes” (a way for a Facebook user to express interest in a post without writing a comment) was 269.6. The average number of “retweets,” the Twitter equivalent to a Facebook “like”, across all DMOs

was only 4. Furthermore, every single Facebook post from a DMO had at least one “like” attached to it.

These findings demonstrate that regardless of the type of post (interactive or non-interactive in nature), users are still engaging with the information DMOs provide, and Facebook is a much stronger platform for measured interaction. The most prevalent form of this “engagement” is the “like” and the retweet, a simple act of approval that requires little involvement from the user. Though in interviews many representatives from DMOs cited social media’s ability to encourage interaction and collaboration, these findings indicate that the DMOs are not necessarily utilising social media to their full potential in these areas.

Table 8 here

Social media and DMOs

Wang et al. (2002: 14) argue that a virtual travel community should bring together “a broad range of published content” and that the “range, richness, reliability, and timeliness of information available to members [of these virtual communities] is likely to be far greater than that of any information available through more conventional means.” The majority of posts and tweets from DMOs during June 2011 included some form of other content, whether it was a photo, a link to a website, or a video to reinforce the range, richness and reliability argument put forward by Wang et al .

Figure 21 summarises the type of content included in the combined DMOs posts on Facebook and Twitter during June 2011. Though Twitter and Facebook are often associated with casual banter and meaningless personal updates, companies use the

services for promotion. It is therefore important for organisations to include as much rich content as possible, while providing the necessary information to their consumers.

Figure 21 here

The majority of all posts across both platforms contained some form of additional content- 81% of Facebook posts and 82% of Twitter posts included content. However, as the frequency with which the DMOs posted and the degree of interaction they displayed varied between Twitter and Facebook, so did the nature of the content was included. Content came almost exclusively from the DMOs themselves, not other users. A category was devised to measure how often DMOs requested content from users and what type (photos, videos, audios), although less than 1% of posts (5 posts of a total 670 across both platforms) fell into this category. An example of using users' content on the Web is the fact that 95% of the images that stream on Visit Britain's home page come from the official Visit Britain account on Flickr.com, a photo-sharing social media platform. This Flickr account boasts 300 members who have contributed over 6,000 photos, and according to the VisitBritain respondent, this saved Visit Britain over £200,000. Though Flickr is a natural choice for sharing photo-content, Facebook and Twitter could be used more often to share user content and create a stronger sense of collaboration and community.

Posts often redirected users to another website. Eighty percent of posts on Twitter included a link to an external website, while only 51% of Facebook updates included links

to websites. The VisitBritain respondent argued that “when users come to Facebook, they want to stay on Facebook.” In accordance with VisitBritain’s strategy, only 5 of VisitBritain’s 22 Facebook posts during the month of June (23%) contained a link to an external website. Facebook is a much more complex platform than Twitter, allowing users to organise various types of multimedia, join pages, create an in-depth profile, and install third-party applications. Therefore, when users access the website, they generally tend to, and want to, stay on Facebook.com rather than browse other sites on the Internet. VisitBritain seeks to remain loyal to their Facebook fans by not bombarding them with information and links to external websites.

Another reason that the DMOs Twitter updates link to other websites over three times as often as Facebook updates can be attributed to Twitter’s 140-character limit. Tweets cannot exceed this limit, so providing a hyperlink (which can be automatically shortened to contain less characters) allows the distribution of more information. While Facebook and Twitter enable the user to interact and converse with large groups of people, DMOs are still using these social media devices as promotional tools. This is reflected by 86% of all Facebook posts and 87% of all Twitter updates classified as promotion-related. Figure 22 depicts the type of promotional information DMOs included in their Twitter and Facebook posts and tweets during June 2011. These categories were not mutually exclusive, and many updates promoted several things at once. It makes sense that nearly 80% of posts on either platform promoted the destination in some way, as the accounts analysed were from tourism boards- whose primary objective is to *market destinations*. In promoting destinations, events, attractions, or websites, it is also in the best interest of the DMOs to provide as much information as possible. Given the brevity of a Facebook or Twitter post,

DMOs often linked to more information, or used the space to provide key pieces of information.

Figure 22 here

As a sub-category, information was classified in two ways: factual/historical information, or opinion/review. An example of factual or historical information is a tweet that provides dates and opening hours of a local festival, or information about the history behind a particular national holiday. Posts classified as opinion and review generally included information in “Top Ten” style lists, or a review of a hotel or attraction with 62% of Facebook posts containing information compared to 74% on Twitter. The majority of information posted was factual in nature. The amount of information classified as opinion or review is skewed by the quantity of reviews on the VisitBritain Super Blog. Occasionally, DMOs would use their Facebook account to encourage users to follow their Twitter account, or visa versa. However, the representation in Figure 22 for how often Twitter was used to promote another social media outlet is skewed. In addition to Facebook and Twitter accounts, VisitBritain manages an active blog, the VisitBritain Super Blog.

The “#” symbol (referred to as a ‘hashtag’) is used to organise posts and make them searchable. The Twitter account of the author of the post is also featured in the post, as several UK travel journalists work in conjunction with VisitBritain to maintain the Super Blog. Twitter is used as an integral tool in promoting new posts on the Super Blog; 67% of VisitBritain’s tweets from June 2011 linked to an entry on this site. Many of these tweets

also contributed to the high level of repeated tweets from VisitBritain, as they attempted to promote these posts several times throughout the day, to avoid the aforementioned problem of tweets becoming “buried.” Very few posts (6% of Facebook posts and 4% of tweets) were classified as “general.” Though Twitter and Facebook are often criticised for being “noisy,” vain, and purposeless, DMOs strive to make the most of each and every post by including rich media, helpful information. The frequency, interactivity, and nature of posts all contribute to form the overall social media strategies of the selected DMOs. While some patterns exist, no two DMOs operate their social media accounts in precisely the same way. Other factors also contribute to the overarching social media strategies such as the organisational structure of the DMOs.

DMO Organisational Structure and Social Media

Wang et al (2002) identify that “since people now can surmount time and space and ‘be’ anywhere, marketing organizations should adapt accordingly and embrace this new space, [virtual communities], as a marketing tool capable of organizing people’s knowledge about, and desires for, the places they may wish to visit” (Wang et al., 2002). The way in which DMOs organise their presence in these communities and online space varies significantly from country to country. Moreover, Rogers’ (1995, cited in Schegg et al., 2008) innovation theory proposes five adopter categories: “pioneers” (2.5%), “early adopters” (13.5%), “early majority” (34%), “late majority” (34%), and “laggards” (16%). This has since been applied not simply to consumer’s purchasing habits of new goods, as

originally intended, but also often to organisations and the way in which they adopt new technologies (Schegg et al. 2008). Consequently, it is expected that DMOs adoption of social media platforms will be varied. Of the seven DMOs in the study with a presence on Facebook and Twitter, six have multiple Twitter and/or Facebook accounts. DMOs often manage a Facebook or Twitter account for each regional office. In some cases, there might be several accounts organised by language. For example, this is the case for the German National Tourism Office (Wrenn, 2011).

Visit Britain, on the other hand, manages only one account. Tourism Queensland's strategy is similar, as the respondent explained that they have "weighed all the pros and cons and absolutely feel it is better to keep one central environment that's really well managed...[and the downside is that]...you can't do things specifically," In contrast, the respondent at VisitBritain suggested that it is possible, and relatively simple, to direct posts on Facebook to users (who "like" the page) of a specific demographic. For example, a Facebook post could be set to appear only to those who have publicized on Facebook that they speak Portuguese or only those who have set their location to Brazil. Tour Spain operates several social media accounts the respondent at the London Tour Spain office, explained that the Ministry of Tourism in Madrid is in the process of developing a central strategy to "bring the offices together" since "up until now [June 2011], every country was doing more or less what they thought they should."

Which role or job title should be responsible for managing the DMOs social media efforts varies drastically from organisation to organisation. Substantial insight into how the DMO feels about social media can be gained from understanding what roles are associated with

managing a social media strategy. Even when organisations are actively trialling and implementing social media strategies, Gretzel et al. (2006: 119) found that their colleagues and superiors are often unsupportive and/or uncomfortable with adopting new Web technologies. The respondent at VisitBritain, confirmed this notion in an effort to “reflect the organisation’s commitment to social media” as the marketing division employs seven people, 3 of which make up the digital team. However, it is only since the beginning of 2010 that these three titles all included the term “social media.” These roles include the Head of Digital and Social Media (formerly Head of Digital Media), Social Media Programme Manager (a new role), and Online and Social Media Content Manager (formerly Online Content Manager.) Whilst the roles have not changed radically, they have been modified to include “social media” in the titles. Having the titles incorporate “social media” was crucial to demonstrating to the rest of VisitBritain how important social media is to the organisation.

Most of the DMOs delegate one employee to be responsible for both the Twitter and Facebook accounts. The French and British DMOs are the only ones to differentiate the roles according to social media platform. The person responsible for managing the French DMO’s Twitter account is in the PR department while the person responsible for managing the Facebook account is in charge of the three-person online marketing team. The French DMO respondent referred to the employee who manages Facebook as Community Manager, and explained that this job title was similar to the digital marketing titles at VisitBritain. This is also due to change to reflect a greater dedication to social media. At the time of the interview (July 2011) the respondent already had a greater part of the job consumed with maintaining B2B and B2C relationships via the social media channels.

At Tour Spain, social media management and development is not an official responsibility of any particular position, including positions within the marketing department. As the respondent indicated, any efforts would “fall into the lap” of whichever employee is comfortable and interested with social media. In this case, because the respondent “really likes technology,” anything that has to do with technology and/or the Internet “ends up on [their] desk”. In the case of Visit Mexico’s London office, it only employs two full-time staff. For that reason, while Visit Mexico “strongly believe that the Internet, Facebook, and Twitter are fantastic...you need to have someone who is able to monitor them all the time [because] if the news is not fresh, there is no point in having it” (Visit Mexico respondent). Some DMOs lack of activity can most likely be explained by either the organisation not prioritising social media as a marketing tool, and/or lacking the employees, or the qualified employees, to manage the efforts. At the majority of DMOs, the management of social media was seen as a marketing role. The delegation of duties involved with managing social media contributes to the varied strategies of the analysed DMOs. Related to roles and responsibilities is funding, which also differed between the DMOs.

Funding

The majority of DMOs interviewees were unwilling to divulge the specifics of their budget as one would expect in a highly competitive business such as tourism marketing, yet there were still some common themes revolving around the funding of their social media strategies. Clearly DMOs often “struggle with limited financial and human resources” (Gretzel et al., 2000:146) which was reinforced by nearly every DMO which expressed that their budgets were small in comparison to other DMOs. Social media is often used a way

of dealing with small budgets since when faced with budget cuts organisations naturally “have to become much more clever in how [they choose] to use their resources” (Tourism Queensland respondent). VisitBritain’s current allocated budget towards social media marketing reiterates the fact that even DMOs actively embracing social media are in the infancy of their strategies. VisitBritain’s spend is around £200,000 annually on social media, which accounts for two percent of the £10 million marketing budget. Though each region of the world used to have its own marketing budget, it is now based in London. The majority of the £10 million budget in 2011 will be spent on the “You’re Invited” campaign in various ways such as banner advertising, e-consumer relationship management (eCRM), and television advertisements. The VisitBritain respondent, however, feels that social media has delivered far more results. When using social media effectively, “you gain a friend for life, someone you can inspire everyday with original content”. An example of what some of the £200,000 budget has been allocated towards is the successful “Top 50 UK Places” Facebook application, the respondents proudest achievement. “Top 50 UK Places” “encourages visitors to check in every time they reach a notable British location and write a review of what they find; this information then automatically updates a “Top 50 UK Places” leader board on Visit Britain’s LoveUK Facebook Page” (Black, 2011). Visit Britain is the first DMO to use geo-location activity. Geo-location is the technology that enables individuals to use a device, such as mobile phone or computer, to find their location. “Top 50 UK Places” uses these “check-ins” to create a top 50 list of attractions. This page gained 250,000 visits in the first couple of weeks, and increased the number of fans of Love UK, VisitBritain’s official Facebook page, by 34% (Black, 2011). Conte (2011)

explains that this sort of application has “core longevity;” VisitBritain plans to launch similar applications such as “Top 50 UK Shows.”

In contrast to VisitBritain, the German National Tourist Board spent about £10,000 on social media in 2010 according to the respondent interviewed. This happened largely because FIFA awarded them with an extra £10,000 in addition to the expected budget and it was felt that this money could best be spent towards advertising on Facebook as a sort of a trial attempt. As the respondent explained, the money was spent to purchase a small advertisement that displayed a poll that asked the question “Which team will score the most goals at the 2010 FIFA World Cup?” When users voted, it prompted them to become a fan of the German National Tourist Board Facebook page. During the three weeks this advertisement ran, the number of fans for the German Facebook page increased 65.4%, but the respondent admitted that they “obviously didn’t start with that many.” During this period, the advertisement net 2.9 million impressions, yet only 521 fans “liked” the Facebook page (a conversion rate of only 0.018%). The respondent acknowledged that this was a very disappointing result given the money spent. A previous advertisement had resulted in 1,400 “likes” in 10 days, which the respondent deemed much more successful.

The German National Tourism Board was particularly frustrated with the FIFA Facebook campaign because of the technical Facebook billing procedure. Facebook deducts the cost-per-click of the advertising daily, which the respondent noted was “very hard to administer” for the accounting department. This is one reason why the German Tourist

Board is considering outsourcing their social media efforts to an agency that can better organise the accounts and invoice them on a less-frequent basis. In parallel with the German National Tourism organisation, building third-party Facebook applications like “Top 50 UK Places” is an example of something that is unlikely to be handled in-house at this stage in DMOs social media strategies. To create engaging, creative applications via Facebook requires outsourcing to Facebook application development companies, such as Betapond. This company was contracted by VisitBritain for “Top 50 UK Places,” the same company that Discovery Ireland employed to develop a similar application. Whether or not DMOs will have the necessary funds and technological skills to develop these sorts of applications in the future is unclear. Even so many DMOs have not yet explored using Facebook applications to create more dynamic, engaging pages. Some social media strategies simply lack the funds. At the London office of Tour Spain, the respondent explained that the role of social media often becomes the responsibility of one of the many unpaid summer internships where “the other offices are small and won’t include a community manager type of person” anytime soon. In fact, 2011 will mark the first year that any money at all has been allocated towards social media and online networks in the case of Spain. As the respondent suggested, the necessary funds will probably be taken from the television budget since “in the past years, every time [Tour Spain] has had to take money from something, it has been TV [budget]”.

This notion that television commercials are out-dated and ineffective is not uncommon in social media literature. According to Borges (2009: 25), the television commercial is “one

of the most blatant examples of traditional Marketing 1.0,” marketing that he describes as “intrusive, interruptive, and a style of one-way shouting at customers.” The Turkish Ministry of Tourism and Culture respondent explained that it only ran one, month-long television spot in the UK once a year, during January and February, due to increased bookings during those months. In contrast, the France Tourism Development Agency had no plans for television commercials. DMOs are looking for other ways to spend their marketing budget more effectively, and social media often stands out as particularly effective.

Audience Development and Social Media

If Facebook were a country, it would be the fourth most populous in the world (Qualman, 2009). Social media reaches people at a scale and speed larger and more quickly than previous communication mediums. Accordingly, the diversity of social media users is enormous and it is evident from this research that DMOs are actively looking to engage two markets through social media- the youth market and businesses and trade professionals. Social media is predominantly used by the younger generation. For that reason, many companies are hesitant to participate in social media if their markets are not focused on the youth segment. The respondent from London’s Turkish Office of Culture and Tourism attributed the relative lack of use of social media to that fact that the majority of British visitors to Turkey are “older” and “affluent”. However, the number of adults using social networking websites such as Facebook is increasing. The number of adults aged 46-55 who use social networks increased by 30% 2008-2010 (Zickuhr, 2010). During the same time period, usage among those aged 56-64 increased 34% (Zickuhr, 2010). Tourism Queensland recognizes that “there is a large number of over-50s [on Facebook]”

so that platform “offers the breadth [they] are trying to reach”. But the younger generation are the focus of many of the DMOs. In 2010, the French tourism board launched a Facebook group called “Francophonik” to promote French music and festivals in the UK (France Tourism office respondent). This campaign was geared wholly towards a younger clientele. Part of the campaign involved partnering with Eurolines, the European coach service. The respondent noted that this particular campaign was so successful (based on Euroline bookings into France) that they repeated the same campaign in 2011.

Similarly, VisitBritain also partnered with student travel companies STA Travel and Travel CUTS and low-cost airline Air Transat to develop a Facebook application based competition geared towards students. The application was called “Unite the Invite” and launched in February 2011, randomly matched up pairs of participating Facebook users. The users then had to search for their partner, using the help of their online network, and the winning pair won an exclusive trip for two to London, Edinburgh, Glasgow, Manchester, Cardiff, or Liverpool (Fenrich, 2011). Tourism Queensland also partnered with STA to take advantage of the youth representation on Facebook by providing working visas to young travellers whose entry point into Australia was via Queensland (Tourism Queensland respondent). Likewise, the respondent from Tour Spain explained that given the majority of their Facebook fans are younger, it guided their decision to sign an agreement with the football team Real Madrid to use sport heavily on the Facebook page. Visit Mexico has also created a campaign for the youth market. In July 2011 they launched a six-month contest called “I Pic Mexico”. As the Visit Mexico respondent explained, “I Pic Mexico” encouraged UK tourists who have previously been to Mexico to submit photos of what Mexico means to them. This particular campaign was geared towards a younger

audience, and also aimed to increase the followers to Visit Mexico's official Facebook page. Though social media usage is no longer limited to teenagers and students, DMOs are actively employing social media as a means of engaging with these markets.

Social media also carries benefits for B2B relations, not simply B2C relations, as several DMOs pointed out during interviews. The respondent from the France Tourism Development Agency cited the biggest success of the adoption of social media was as ability to amass a network of travel writers and journalists via the creation of a solely Public Relation Twitter account. This account, @AtoutFranceUKPR used primarily to "tweet regularly things that are relevant for journalists and also to increase the number of followers...the network" (France Tourism Development Agency respondent). The argument here is that with easier access to relevant information, news, and events, and well-maintained relationships with those in the press, France-related news would be more widely covered in the media. As the respondent explained, with around 5,000 travel journalists in the UK, having 1,200 on the @AtoutFranceUKPR, created in November 2010 was seen as a major achievement. The German National Tourist office has also found that journalists like Twitter and the respondent attributed this to the fact that "journalists want to get to information as quickly and as simple as possible without all the glamour; Twitter is simple, quick, and easy for them" .

For Visit Britain, Twitter is a strong PR marketing tool since the majority of @VisitBritain's followers are domestic visitors; therefore using twitter for B2B relations proves very effective according to the VisitBritain respondent. Likewise, the respondent from Tourism Queensland also mentioned that in the future, their organisation "would like to trade

environment as well as a consumer environment” on one of the social media platforms in the future. They were especially interested in developing better ways to use social media to interact with and inspire travel agents, who in turn could create and utilise their own networks of friends and followers. However, a reason, Tourism Queensland’s respondent cited for keeping consumer and business relations separate, was that when it comes to social networks, the way DMOs engage with consumers compared to business and the sort of information each segment is interested in varies drastically. For example, Tourism Queensland has spent a large amount of time getting to know travel bloggers. In doing so, they know who to approach with what kind of information since, “it’s really important if you’re talking to people that you’re talking to them with information that they want to hear” (Tourism Queensland respondent).

Measuring Success in Social Media

A major concern companies identify when considering whether or not to use social media, or in the early stages of adopting social media strategies is how to measure the return on investment (ROI.) According to Fisher (2009: 189), “the ROI within social media has long been a bone of contention, and seems likely to become ever more so, with the equally lightening spread of both social media use and savage budget cuts.” Marketing professionals “are under constant pressure to measure everything they do,” and the success of social media efforts are often extremely difficult to gauge (Fisher 2009: 190). Marketing 2.0, a term coined by Borges (2009: 25) for the new types of marketing made possible by Web 2.0 is characterized by “conversations, collaborations, communities, and world of mouth.” As a result, social media metrics are broad. They might measure

“audience size (e.g. number of followers), reach (e.g., viral impact), engagement (e.g., number of comments), sentiment (e.g., consumer response) and outcomes (e.g., resulting traffic, conversions)” (Schetzina, 2010a). Furthermore, social media often requires qualitative measurements, something online marketers are typically neither comfortable nor familiar with (Fisher, 2009). This study has identified three key areas in which the DMOs social media efforts are being evaluated: audience size, the degree of consumer engagement, and consumer sentiment.

Most DMOs measure the ROI of their social media strategies by the number of followers/Facebook “likes” and the rate at which those numbers increase. Wrenn (2011) of the German National Tourist Board considers measuring ROI impossible because the tourism board is not a commercial company “and can’t measure how much money is made, as such.” Still, targets are in place. For 2011, the goal is to gain an additional 4,000 fans on Facebook (in order to have 10,000 total fans). Those in the earlier stages of social media adoption are often concerned with amassing as many followers as possible.

The German Tourist Board does not measure engagement as the respondent explained, “obviously we can, but we just want fans because that’s what everyone looks at externally.” The respondent continued to explain that the head office, regional offices, partners, and even the German government pay careful attention to the Facebook efforts; as they do not have access to other statistics, they are concerned primarily with the scale of audience, i.e., the number of Facebook fans. The France Tourism Development Agency effectiveness is measured by “the number of followers and the rate at which the followers increases” (France Tourism Development Agency respondent). Tourism

Queensland, in contrast, decides how to measure their efforts based on targets and goals set by each particular campaign with the respondent for Queensland explaining that “there’s a whole series of metrics- visits to the website, views of content, increasing the number of Facebook fans, or increasing the number of people on a database who opt to receive information from Tourism Queensland.” Though the respondent mentioned varying metrics of measurement, the majority of those mentioned had to do with numbers and audience size, not how consumers are engaging or their sentiment. This suggests that even organisations comfortable with social media are primarily focused with growing numbers.

VisitBritain’s Facebook page received 53 million views in 2010 compared 18 million on VisitBritain’s website’s (<http://www.visitbritain.com>) (VisitBritain respondent). Social media has the benefit of being something people interact with regularly, often daily, so whatever the audience size, they view content repeatedly and become very familiar and up-to-date with the brand. Therefore, striving to increase the number of people who engage with this information is an understandable goal. Measuring this engagement is also important in order to understand what is successful versus what is futile. According to Tour Spain:

Successful social media is determined by the way people interact, whether or not they respond to things we post. At the moment, because it’s all very new, we are looking more at quality than quantity. Instead of the number of followers, [it’s about whether or not] people ask things...do they respond to what we say and in which way(Tour Spain respondent)

Tour Spain's tactic is different to many tourism boards since they want to assure good quality content before using other metrics, such as audience size, to evaluate their strategy.

As part of a campaign with student travel agent, STA Travel, Tourism Queensland was solely focused on measuring interaction. The campaign offered free working holiday visas to those whose entry point to Australia was Queensland. One element of the campaign was live chat on Facebook each Friday to answer travel questions. Through this, they were able to measure how many people were engaging and interested in Queensland as a tourism destination. Though Tourism Queensland cited measuring "the number of followers" as the current method of evaluation social media efforts, the respondent from the France Tourism Development Agency identified engaging with consumers "at the core of what [needs to be done]". This was attributed to the need to have direct communication with consumers to the fact that France is a destination largely visited by independent UK travellers. That is, due to its proximity to the UK and ease of which to travel there, "the number of people who actually use a traditional travel agent to go to France on a holiday is quite small" (France Tourism Development Agency respondent). As the France Tourism Development Agency respondent explained:

The trade is very important to some products, like the ski market, but when it comes to a summer holiday, most UK travellers to France would book independently. From that point, we are different from other destinations in that we have to adapt our marketing because of that. Social media is a major tool for that.

(Respondent, France Tourism Development Agency, 2011)

The respondent also noted that, like embracing social media, transitioning from a trade-only strategy to a B2C strategy is quite new and constantly changing, but at the core of this is creating content users are interested in and actively engaging with. For many, social media is more about engaging than hard selling. The respondent at VisitBritain is wary about updating Facebook constantly and bombarding consumers with too much information. In contrast, the French tourism board respondent agreed that one should “be very careful with hard sales...to be careful that people don’t feel we are selling something too hard...we are not here to sell directly”. For VisitBritain, this tactic seems to be working, and is converting into more spending. Users who visited the VisitBritain shop (<http://www.visitbritainshop.com>) via clicking a link through Facebook were 28% more likely to purchase something and had larger shopping baskets 58% of the time than consumers driven to the site from elsewhere (VisitBritain respondent).

The degree to which DMOs are measuring success based on the degree of engagement with consumers is limited since research found that the level at which DMOs are actively interacting with their audience is relatively low. A further issue that emerged in interviews was social media’s ability to survey consumer sentiment. Consumer sentiment is very closely related to consumer engagement; if consumers are not engaging, then there is no way to measure sentiment. If they are engaging, then how do they feel about the organisation, destination, or experience? Interacting with consumers can also be very beneficial for organisations since consumer reviews and opinions are often regarded as more believable and unbiased by consumers. Both Tourism Queensland and VisitBritain have examples of consumers helping to strengthen or repair the destination brand.

The Tourism Queensland respondent indicated that during the floods in Queensland in December 2010-January 2011, domestic Facebook fans were able to post pictures and demonstrate that most of Queensland, especially the tourist areas, were “absolutely fine” and “it was a great way to create a community of people talking positively about Queensland at a time when the media was saying ‘half of Queensland is underwater’, ‘it’s a nightmare’, ‘it’s a disaster.’ “In an hour,” explained the respondent, “you can watch [on Facebook] what’s going on and anecdotally understand how people feel.” Tourism Queensland also measured consumer sentiment during the aforementioned STA travel campaign. They were able to gauge how those interacting on Facebook felt about Queensland as a destination- for example, if they felt it was expensive or if they felt it was a “must-visit” (Tourism Queensland respondent). In the past, this would have involved measurement through focus groups, which are still sometimes used but are always “more costly and take more time” (Tourism Queensland respondent).

VisitBritain has an example similar to Tourism Queensland’s flood example illustrating how the public can help carry out the work of a DMO by promoting and defending a destination. During the 2010 BP oil spill near the Gulf of Mexico, Love UK (VisitBritain’s official Facebook page) received some negative comments from a North American user. Due to the time difference, these comments were made during what was the middle of the night in London. By the time the VisitBritain employees arrived at work, other Love UK members had come to the defence of VisitBritain and reminded the critic that the BP spill had little do with the general public and tourism in the UK. The fact that the comments on Love UK are consistently “99% positive” is something VisitBritain’s respondent appreciated and took

pride in. Yet only 13 of 670 total (1.9%) Facebook and Twitter posts during the month of June were related to customer service. Twelve of the thirteen were from the @VisitBritain Twitter account and were responding to criticisms. This suggests that either the DMOs are seldom encountering customer service related issues via social media, or that, more likely, they are not yet using social media to mitigate these problems. The International Federation for IT and Travel and Tourism will host a workshop at the 2011 World Travel Market to discuss using social media for “real-time service management.” This workshop will teach organisations to respond quickly via social media to customer needs. Using this skill to build a strong online community that is loyal and trustworthy is vital to maintaining and supporting positive messages about the destination via social media.

Conclusion

DMOs are at the initial stages of understanding and experimenting with how to use social media to promote their destinations and many “struggle to keep pace with the evolution of new technologies [and] the emergence of new advertising strategies” (Gretzel et al., 2000: 146). Both the primary research conducted in this study and the supporting secondary research confirm Gretzel et al.’s (2006) notion that that the use of social media among DMOs is still largely experimental over five years since their study was published. This study has sought to classify, examine, and analyse how top NTOs are utilising social media to engage consumers and market destinations. The results from the content analysis as well as the findings from interviews have illustrated that the social media strategies of top DMOs varies considerably, and with the exception of the efforts of Visit Britain and Tourism Queensland, are largely rudimentary. Whilst this is only a small sample of NTOs, it is examining the world’s major destinations and so examines a large

proportion of the world's international arrivals. The two examples of VisitBritain and Tourism Queensland offer many examples of best practice which may well offer important lessons for other NTOs starting to enter the world of social media to market their destination.

Three key findings emerge from this research. Firstly, the majority of DMOs are not currently utilising social media to their full effectiveness when it comes to the ability to interact and engage with consumers. Secondly, social media is still not widely recognised and/or respected as a vital tool in marketing strategies, and thus is frequently underfunded and/or neglected. Lastly, DMOs could benefit from becoming even more innovative and creative when it comes to their social media strategies, in order to fully differentiate these efforts from traditional marketing methods. It is also evident that a destination's ranking as far as tourist arrivals does not dictate a more developed social media strategy, as it can be assumed that many less-visited destinations (such as Queensland) are far more active and innovative in their social media efforts. With regards to what factors, if any, contribute to a high level of social media activity, it has been found that perhaps the main factor that dictates an advanced social media strategy is the simple acknowledgment of social media as a powerful marketing tool. DMOs that recognised the capability of social media, such as Visit Britain, have more highly developed social media strategies.

This research confirms that top DMOs ascribe to the view espoused by Wang et al. (2002: 416) that "virtual tourism communities will provide a substantial foundation with which to foster communication among and between travellers and the industry." Though in different stages of development and with different strategies, the DMOs examined are clearly

working to incorporate social media into their marketing strategies. However, the sectors that coalesce to create a community known as the tourism industry seem to be “reluctant to make full use [of social media] not so much because of active rejection, but because they are unaware of its full potential” (Hay, 2011: np). Social media is still a relatively new, unknown, and most-importantly, a largely unproven technological phenomenon. As the use of social media as a destination marketing tool becomes more widespread, the marketing strategies of destination marketing organisations will likely evolve and improve. In fact, the following quotation summarises the relationship between social media and DMOs

Since tourism is traditionally studied and examined in relation to geographic places or space, it is understandable that some tourism marketing organizations lack confidence in and basic understanding of how a virtual community can be used as a marketing tool. However, we cannot afford to ignore this revolutionary changes information technology brings us...

(Wang et al., 2002: 416)

DMOs understanding of social media is vague and varied. Very seldom are the rights and wrongs of general marketing rules precisely defined, but rules surrounding social media marketing are even more ambiguous and unclear. This research has provided very few overarching patterns of usage, but rather a broad picture of the relationship between social media and DMOs in 2011. To successfully develop these social media strategies in the future, DMOs should firstly acknowledge the scope and reach social media can have.

DMOs face a variety of complex issues when developing an online presence, especially a social media presence (Gretzel et al., 2000). Many DMOs could improve their position by

first acknowledging social media as marketing tool and then by creating a formal, but flexible, strategy. Policy and action should be aligned, though as with any new technology, there should be plenty of room for experimentation. Many studies outline the advantages of social media and networking such as humanising a brand and increased engagement. They also highlight weaknesses identified in this study (e.g. noise and no direct link to sales) alongside the growth of spam.

DMOs should pay careful attention to these opportunities and threats to ensure that they are using social media effectively. It is apparent that some DMOs are using social media as they would any other marketing tool, neglecting the full potential of its ability to engage and invoke informal conversation. Kaplan and Haenlein (2009) list five key actions to abide by when managing a social media presence: *be active, be interesting, be humble, be informal, and be honest*. These traits differ largely from traditional marketing strategies. Thus, accepting social media as a beneficial tool that is part of an integrated marketing strategy while still understanding its uniqueness as a medium is something that DMOs struggle with.

Figure 29 illustrates a cycle of key steps for successful social media marketing. Though these success factors were originally created in relation to marketing on the Web in general, they are particularly applicable to social media. Engagement and the encouragement of participation are both key in attracting users and retaining users and this study has demonstrated that DMOs need to exhibit more interactive behaviour on their social media platforms. One of the most tangible benefits of social media is that information is publicly available and widely accessible. DMOs need to be up to date and understand how other tourism professionals and organisations are implementing social

media strategies to learn from their achievements and mistakes. Most importantly, a flexible and innovative approach is fundamental to developing lasting social media success. Recognising social media as a powerful marketing tool and actively improving their social media strategies will pave the way for improvement of DMOs' social media marketing efforts in the future. It is also important to recognise the limitations to this exploratory study.

Figure 29 here

The content analysis reported here would ideally benefit from a longer timeframe, and larger sample size. Were the research to be conducted again, content analysis categories could be adapted accordingly. Though the categories in this study were detailed and sufficient, some were unnecessary whereas others could be expanded upon. Similarly if interviews were to be conducted again, it might be of interest to speak to not only London based employees. Though the interviews reported here benefited from being uniform in nature, length, and location, further research could be enhanced by perhaps speaking to tourism employees from the DMO's head offices. Furthermore, interviewing more than one employee from each organisation could add insight into the area of study. Therefore this study could be used as a basis for additional research. Repeating the same study in a year's time would most likely yield significantly different results, due to the constantly evolving nature of technology and social media. Additionally, similar research with a larger sample size and time period would provide more comprehensive insights to the use of social media amongst DMOs. Furthermore, this research could be easily applied to other businesses and/or organisations in the tourism sectors, such as hotels, restaurants,

attractions or events. Additional studies related to social media and the tourism sector would obviously aid in providing a broad, well-rounded representation of the social media phenomena. Consequently, a more comprehensive typology of strategies to comparatively study social media usage in tourism would emerge.

Though the purpose of this study was to explore social media among the top DMOs as a whole, any one of the individual components of this study could be researched as a topic in its own right. For example, further research could be conducted *just* about the degree of interactivity and engagement of DMOs on social media websites. As social media usage among DMOs becomes more prevalent, this type of research will be very beneficial.

Lastly, though this study selected DMOs of top international tourism destinations, it would be interesting to conduct a similar study with a different sample. Identifying DMOs with unique, active, and/or successful social media marketing strategies and analysing how they utilise social media could be of particular interest to see if any patterns emerge, or how those DMOs differ from those analysed in this research whilst this study has provided one such typology to study social media, future studies will be able to elaborate on these methods. Nevertheless this study has provided an important review of a growing area of NTO marketing which has hitherto attracted little research attention.

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