

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

THE SOCIAL MEDIA INDEX OF EUROPEAN NATIONAL TOURIST OFFICES

A STUDY BY BLUE SAIL CONSULTING

MARCH 2019

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1 TOP OF THE TABLE

Social media is playing an ever increasing role in motivating visitors. Whether it is helping a destination get noticed, getting on a visitors shortlist, booking, travelling or experiencing the destination, places know this is a vital part of their marketing activity.

Some destinations are clearly better at it than others. Some have been doing it for longer. Some have made it central to their activity. But others are still some way behind.

We decided to have a look at a few simple metrics. To take a snapshot of European National Tourist Offices (NTOs) social media platforms and see who was performing the best.

The results throw up a few surprises and give those wanting to catch-up some ideas about who they need to look at.

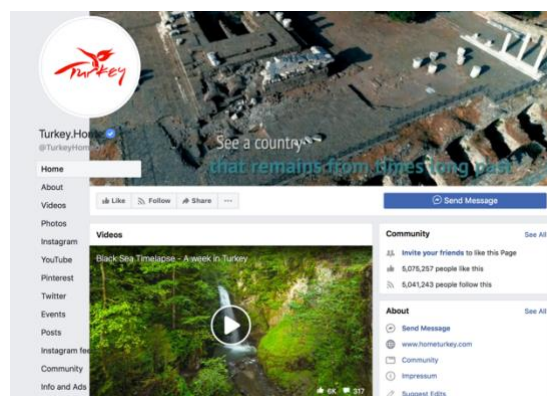
We looked across three major platforms – Facebook, Instagram and Twitter and we considered the volume of activity the NTO was producing or supporting in terms of posts and the level of engagement with the sites in terms of ‘likes’ and ‘follows’.

The results are clear – top of the European Social Media Index is **Turkey**. Turkey came top of the consolidated scores across all three platforms. Unsurprising when Turkey also finished top of the separate indices for each platform. With a combined total of approximately 6.25m followers it was way ahead of Britain in second place with 4.1m followers.

What the study also confirmed is the primacy of Facebook. We looked at the combined volume of followers on the 48 NTO social media platforms. Facebook produced 34m followers, Instagram 6m and Twitter 3m.

Table 1 Consolidated Followers from Facebook, Instagram & Twitter

Destination Rank	Consolidated Followers
1. Turkey	6,245,000
2. Britain	4,112,000
3. Germany	3,023,000
4. Switzerland	2,976,000
5. Spain	2,314,000
6. Croatia	2,106,000
7. France	2,001,000
8. Portugal	1,908,000
9. Austria	1,814,000
10. Norway	1,432,000



2 FACEBOOK LEAGUE TABLE

When we looked at Facebook, the volume of followers reflected the popularity of European destinations.

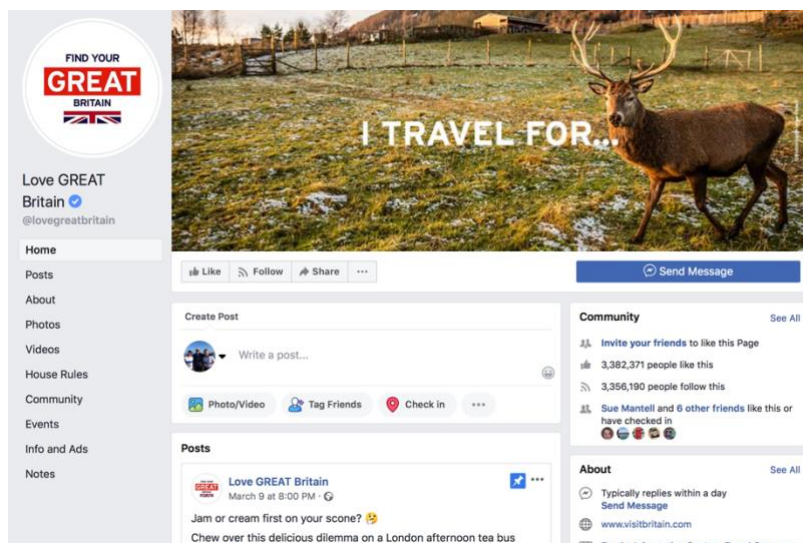
Whether the popularity of the destination drives popularity on social media platforms or vice-versa is unclear. Many of these top destinations were among the most popular destinations before the advent of social media and that popularity will have given these destinations a head start against other emerging or smaller European nations.

What we found however was that **Turkey** was again top of the league table with over 5m followers, followed by **Britain** with 3.4m and **Germany** with 2.7m. In fact the rank order of the top four destinations on Facebook, with **Switzerland** in 4th place reflects the consolidated league table.

The next five destinations were again all the same as in the consolidated table but with some jostling for position among the next 5. France moved up to 5th and Austria climbed to 8th while Spain, Croatia and Portugal all dropped one place and Norway remained in 10th place.

Table 2 Facebook League Table

Destination Rank	Followers
1. Turkey	5,040,000
2. Britain	3,341,000
3. Germany	2,697,000
4. Switzerland	2,475,000
5. France	1,880,000
6. Spain	1,791,000
7. Croatia	1,709,000
8. Austria	1,546,000
9. Portugal	1,390,000
10. Norway	1,109,000



3 INSTAGRAM LEAGUE TABLE

Instagram is a social media platform that has grown rapidly especially among the Millennials.

We started by looking at who was the most active in terms of posts and **Croatia** came top, followed by Turkey, Denmark and Spain. Estonia and Albania also featured in the top 10 showing the great efforts being made by some emerging destination.

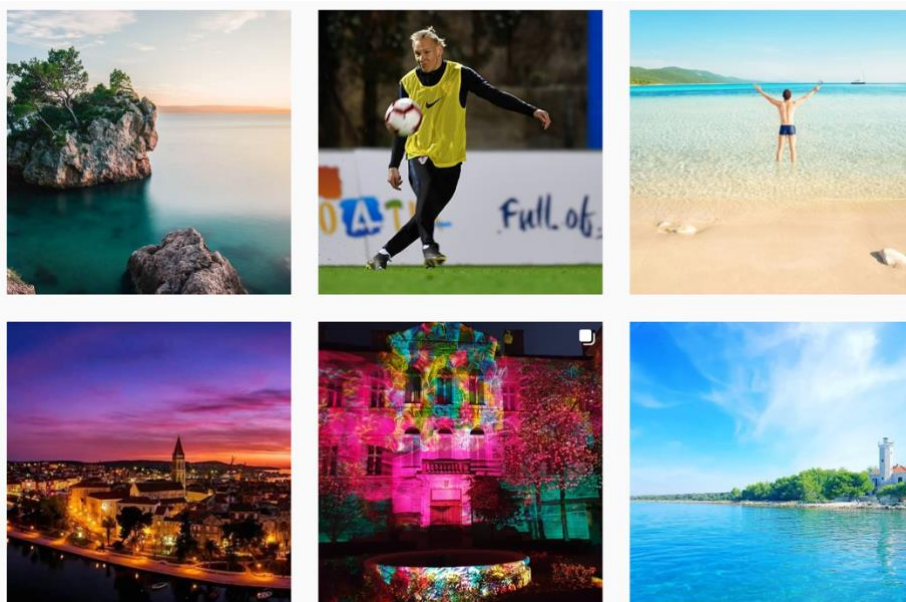
But when it came to followers, **Turkey** once again resumed the top spot, followed by **Spain, Ireland, Portugal** and **Switzerland**.

We also looked at the ratio of followers to posts to try to see which was the most impactful destination in terms of generating followers compared to the volume of posting. Here we found **Switzerland** top, followed by Ireland, Finland and then Britain, showing that the quality of the content is what matters.

Table 3 Instagram League Table - Followers

Destination Rank	Followers
1. Turkey	466,000
2. Spain	452,000
3. Ireland	432,000
4. Portugal	429,000
5. Switzerland	407,000
6. Greece	387,000
7. Britain	386,000
8. Norway	321,000
9. Croatia	295,000
10. Germany	277,000

While a number of destinations should rightly give themselves a pat on the back, others may argue their size inhibits their ability to perform better. It is worth noting therefore that Australia a country of just 25m people and around 7m tourist arrivals, has over 3.5m followers on Instagram.



4 TWITTER LEAGUE TABLE

Finally we looked at the smaller of the three platforms.

We started by looking at who was the most active in terms of tweets and **Portugal** came top, followed by Britain, Greece, Italy and Monaco.

But when it came to followers, **Turkey** once again resumed the top spot, followed by **Britain, Hungary, Belgium (Flanders), Italy** and **Croatia**.

We also looked at the ratio of followers to posts to try to see which was the most impactful destination in terms of followers/posts. Here we found **Turkey** top, followed by Hungary, Macedonia, Belgium (Flanders) and Serbia. However it should be noted that Macedonia has less than 1000 followers while most others in this sample have tens or hundreds of thousands..

Table 4 Twitter League Table - Followers

Destination Rank	Followers
1. Turkey	740,000
2. Britain	385,000
3. Hungary	292,000
4. Belgium (Flanders)	250,000
5. Italy	131,000
6. Croatia	103,000
7. Greece	103,000
8. Switzerland	94,000
9. Portugal	89,000
10. Ireland	82,000

Can't skip the emotion of a blooming season
#Can'tSkipPortugal

visit Portugal

Tweets: 91.5K | Following: 4,804 | Followers: 89.4K | Likes: 12.1K | Lists: 70

Visit Portugal @visitportugal

Visit Portugal is the official web resource for travel and tourism in Portugal | Join us on Facebook: facebook.com/visitportugal

Portugal | visitportugal.com | Joined August 2009

Tweets | Tweets & replies | Media

Pinned Tweet
Visit Portugal @visitportugal · Mar 19
For the 1st time, the Global Exploration Summit #GLEx will take place outside the USA. In July #Lisbon, #Portugal hosts 400+ pioneering researchers & professionals of #science, #art & #technology. The Land of #Magellan welcomes all the #Explorers! @ExplorersClub #ECAD2019 #Events

Who to follow · Refresh · View all

- Turismo de Portugal
- VisitLisboa @TurismodeLi...
- VisitAlgarve @turismo_al...

5 COUNTRY RANKINGS

What follows is a listing for each country, showing their ranking results for consolidated followers and then for each of the different social media platforms. Those shaded green are the top 5.

Country (alphabetical order)	Consolidated Rank /48	Facebook Rank /48	Instagram Rank /46	Twitter Rank /45
Albania	38	39	35	29
Andorra	27	27	26	26
Armenia	33	35	25	44
Austria	9	8	12	31
Azerbaijan	30	29	37	39
Belarus	47	47	45	n/a
Belgium (Flanders)	12	14	31	4
Belgium (Wallonie)	45	46	41	32
Bosnia & Herzegovina	35	34	n/a	n/a
Britain	2	2	7	2
Bulgaria	43	43	38	40
Croatia	6	7	9	6=
Cyprus	28	28	28	25
Czech Republic	18	15	20	19
Denmark	14	17	13	11
Estonia	25	25	21	28
Finland	19	20	11	13
France	7	5	18	20
Georgia	24	21	24	43
Germany	3	3	10	15
Greece	11	16	6	6=
Hungary	23	24	34	3
Iceland	26	26	17	16
Ireland	13	23	3	10
Italy	21	22	15	5
Latvia	32	30	29	n/a
Liechtenstein	44	42	39	38
Lithuania	34	33	33	33
Luxembourg	40	41	30	27
Macedonia	48	48	n/a	41
Malta	15	11	44	21
Moldova	41	40	43	42
Monaco	16	12	23	23
Montenegro	31	31	27	30
Netherlands	17	13	22	14
Norway	10	10	8	37
Poland	42	45	40	24
Portugal	8	9	4	9
Romania	46	44	46	45
Russia	39	37	42	35
San Marino	36	36	36	34

Country (alphabetical order)	Consolidated Rank /48	Facebook Rank /48	Instagram Rank /46	Twitter Rank /45
Serbia	29	32	19	18
Slovakia	37	38	32	36
Slovenia	22	19	16	17
Spain	5	6	2	12
Sweden	20	18	14	22
Switzerland	4	4	5	8
Turkey	1	1	1	1

Note: We did not include Ukraine or the Vatican in these results. Also Belgium has distinctly separate delivery arrangements for the Flemish and Wallonie regions and so both regions are represented separately.

6 CASE STUDY – TOURISM AUSTRALIA

Consistently top of global ranking in terms of engagement with their social media platforms and having led the way, many destinations can continue to learn a lot from the approach taken by Australia.

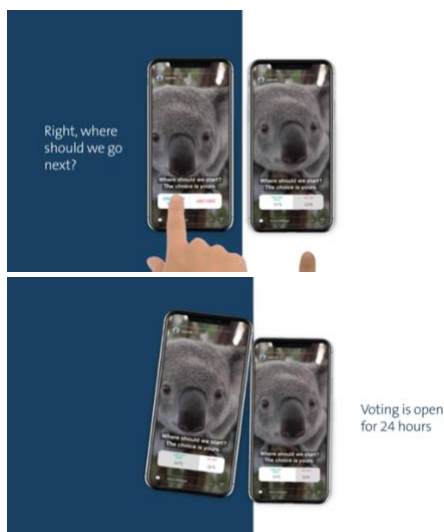
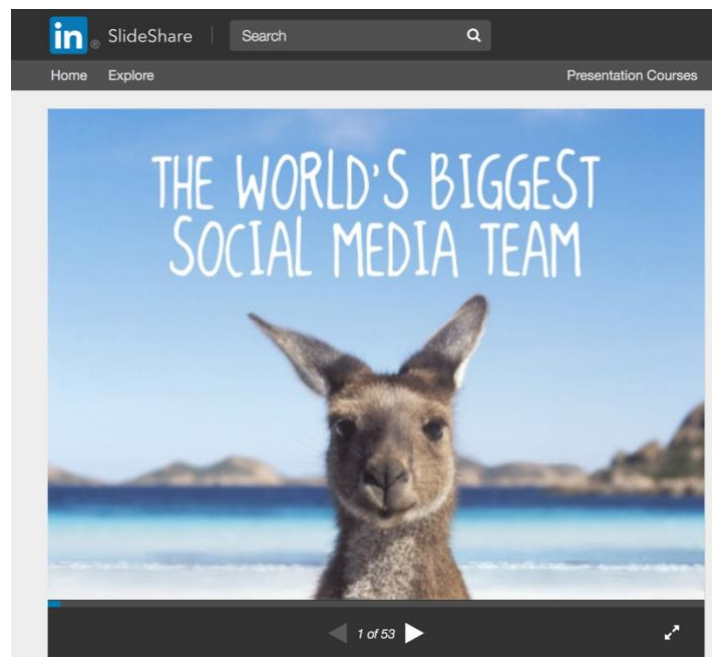
Their approach has been to focus their attention on important social media platforms, with content driven by the industry and visitors.

And the results speak for themselves: over 8m followers on Facebook and 3.5m on Instagram puts the majority of all European destinations in their shadow.

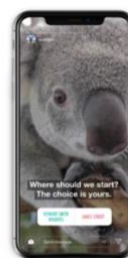
Much of the backstory to the changes they instituted over 5 years ago can be found here (click on the image)

And further information on their approach with industry is available here: <http://www.tourism.australia.com/en/events-and-tools/industry-resources/building-your-tourism-business/using-social-media.html>

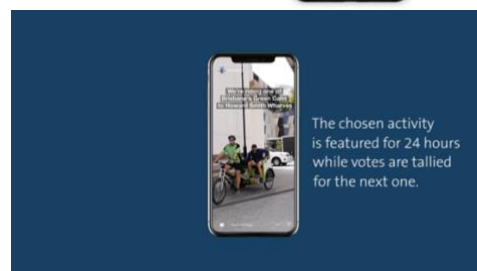
In March 2019, they have just announced a new approach to their Instagram account with a weekly focus on different destinations and fan voting to decide which activities to focus on and cover.



Then using an Instagram poll we ask our followers to choose what happens next.



Voting is open for 24 hours



7 DATA SOURCES

Country	Facebook	Follows	Twitter	Tweets	Followers	Instagram	Posts	Followers	Date Review
Albania	https://www.facebook.com/albaniantourismagency/	42552	https://twitter.com/visit_albania	2.4	6.4	https://www.instagram.com/albania_tourism/	2361	11.6	13/03/2019
Andorra	https://www.facebook.com/andorraworld	169927	https://twitter.com/andorraworld_ad	9.7	13.9	https://www.instagram.com/andorraworld/	898	37.3	13/03/2019
Armenia	https://www.facebook.com/ArmeniaTravelOfficial/	62816	https://twitter.com/Armenia_Travel	0.2	0.2	https://www.instagram.com/armenia_and_travel/	1150	40.6	15/03/2019
Austria	https://www.facebook.com/feelaustriaUK/	1546174	https://twitter.com/austria_uk?lang=en	2.5	5.1	https://www.instagram.com/visitaustria/?hl=en	2279	263	13/03/2019
Azerbaijan	https://www.facebook.com/ExperienceAZE/	155089	https://twitter.com/experienceaze	3.1	1.3	https://www.instagram.com/experienceazerbaijan/	216	10.4	15/03/2019
Belarus	https://www.facebook.com/Belarusby-622968324453256/	4367				https://www.instagram.com/belarusby_official/	456	0.7	15/03/2019
Belgium	Wallonie https://www.facebook.com/BelgianTouristOfficeWallonia	9286	https://twitter.com/WhyBelgium	8.4	4.7	https://www.instagram.com/walloniabelgiumtourism/	104	5	13/03/2019
Belgium	Flanders https://www.facebook.com/visitflanders	753014	https://twitter.com/VisitFlanders	7	250	https://www.instagram.com/visitflanders/	492	18.5	13/03/2019
Bosnia and Herzegovina	https://www.facebook.com/VisitBH/	74672							15/03/2019
Britain	https://www.facebook.com/lovegreatbritain	3340946	https://twitter.com/visitbritain	42.9	385	https://www.instagram.com/lovegreatbritain/	1954	386	13/03/2019
Bulgaria	https://www.facebook.com/bulgariatravelorg/	19555	https://twitter.com/bgtravelorg?lang=en	1.5	0.9	https://www.instagram.com/discover.bulgaria/	572	10	13/03/2019
Croatia	https://www.facebook.com/croatia.co.uk/	1708759	https://twitter.com/Croatia_hr	11.9	103	https://www.instagram.com/croatiafulloflife/	9548	295	15/03/2019
Cyprus	https://www.facebook.com/visitcyprus.uk/	156565	https://twitter.com/visitcyprus	3.6	14.8	https://www.instagram.com/visitcypruscom/	1754	28.1	13/03/2019
Czech Republic	https://www.facebook.com/czechrepublic.eu/	751609	https://twitter.com/visitCZ	13.9	33.3	https://www.instagram.com/visitcz/	1880	65.3	13/03/2019
Denmark	https://www.facebook.com/denmark	645182	https://twitter.com/@GoVisitDenmark	11.9	74.3	https://www.instagram.com/govisitdenmark/	2873	229	15/03/2019
Estonia	https://www.facebook.com/visitestonia	317644	https://twitter.com/visitestonia	2.3	10.3	https://www.instagram.com/visitestonia/	2446	63.9	13/03/2019
Finland	https://www.facebook.com/visitfinland	491222	https://twitter.com/OurFinland	6.5	65.3	https://www.instagram.com/ourfinland/	1321	269	15/03/2019
France	https://www.facebook.com/UK.France.fr/	1880711	https://twitter.com/UK_FranceFR	6.4	31.6	https://www.instagram.com/francefr/	1332	88.4	13/03/2019
Georgia	https://www.facebook.com/georgiaandtravel/	475194	https://twitter.com/georgiaandtrave	0.1	0.3	https://www.instagram.com/georgiatravel/	1168	50.4	13/03/2019
Germany	https://www.facebook.com/visitgermany	2697169	https://twitter.com/GermanyTourism	14.1	49.1	https://www.instagram.com/germanytourism/	2086	277	13/03/2019
Greece	https://www.facebook.com/visitgreecegr	747557	https://twitter.com/visitgreecegr	30.6	103	https://www.instagram.com/visitgreecegr/	2290	387	13/03/2019
Hungary	https://www.facebook.com/hellohungaryHU/	330447	https://twitter.com/wow_hungary	3.3	292	https://www.instagram.com/wow_hungary/	494	12	13/03/2019
Iceland	https://www.facebook.com/inspiredbyiceland	232337	https://twitter.com/iceland	8	46.2	https://www.instagram.com/inspiredbyiceland/	605	93.3	13/03/2019
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Liechtenstein	https://www.facebook.com/FuerstentumLIE/	19835	https://twitter.com/li_travel	3.4	1.5	https://www.instagram.com/fuerstentumliechtenstein/	871	7	13/03/2019
Lithuania	https://www.facebook.com/LithuaniaTravel.global/	78407	https://twitter.com/visitLithuania?ref_src=twsrc%	2.2	3.7	https://www.instagram.com/lithuania_real_is_beautiful/	722	12.2	13/03/2019
Luxembourg	https://www.facebook.com/VisitLuxembourg	23226	https://twitter.com/luxembourginfo	4.7	10.4	https://www.instagram.com/visit_luxembourg/	1032	19.2	15/03/2019
Macedonia	https://www.facebook.com/ExploringMacedonia	3008	https://twitter.com/ExplorMacedonia	0.01	0.7				13/03/2019
Malta	https://www.facebook.com/visitmaltauk/	916527	https://twitter.com/visitmalta	2.3	29.4	https://www.instagram.com/visitmalta/	107	1.3	13/03/2019
Moldova	https://www.facebook.com/discovertheroutesoflife/	34714	https://twitter.com/moldovaholiday?lang=en	1.4	0.5	https://www.instagram.com/moldova.travel/	74	2.1	13/03/2019
Monaco	https://www.facebook.com/visitmonaco/	811401	https://twitter.com/visitmonaco?lang=en	18.3	27.2	https://www.instagram.com/visitmonaco?hl=en	1670	50.6	13/03/2019
Montenegro	https://www.facebook.com/ntocg/	116376	https://twitter.com/SeeMontenegro	1.6	5.9	https://www.instagram.com/gomontenegro/?hl=en	1792	28.4	13/03/2019
Netherlands	https://www.facebook.com/visitholland	765472	https://twitter.com/visitholland	11.6	63.1	https://www.instagram.com/visit_holland/	1832	58.2	13/03/2019
Norway	https://www.facebook.com/visitnorway.uk	1109170	https://twitter.com/visitnorway_uk	2.6	1.8	https://www.instagram.com/visitnorway/	2232	321	13/03/2019
Poland	https://www.facebook.com/poland.travel.us	13000	https://twitter.com/PolandTravelUS	1.5	16.5	https://www.instagram.com/polska.travel/	548	5.5	15/03/2019
Portugal	https://www.facebook.com/Visitportugal/	1390355	https://twitter.com/visitportugal	91.4	89.1	https://www.instagram.com/visitportugal/	2307	429	15/03/2019
Romania	https://www.facebook.com/romaniatravel.ro	15241	https://twitter.com/romaniabrand	0.2	0.164	https://www.instagram.com/romania_tourism/	52	0.629	13/03/2019
Russia	https://www.facebook.com/russia.travel.official	46502	https://twitter.com/russia_travel_?lang=en	2	2.9	https://www.instagram.com/russia.travel.official/	1739	4.5	13/03/2019
San Marino	https://www.facebook.com/visitsanmarino	51234	https://twitter.com/VisitSanMarino	6	3.4	https://www.instagram.com/visitsanmarino/#	1162	11.1	13/03/2019
Serbia	https://www.facebook.com/serbiatourism	79623	https://twitter.com/serbiatourism	3.4	43.8	https://www.instagram.com/serbiatourism/	871	75.4	13/03/2019
Slovakia	https://www.facebook.com/slovakiatourism	43769	https://twitter.com/SlovaKB?ref_src=twsrc%5Eg	0.87	2.4	https://www.instagram.com/slovakia.travel/	529	14.7	13/03/2019
Slovenia	https://www.facebook.com/slovenia.info	555785	https://twitter.com/sloveniainfo	15.2	43.9	https://www.instagram.com/feelslovenia/	2017	155	13/03/2019
Spain	https://www.facebook.com/spain.info.gb	1791130	https://twitter.com/Spain_inUK	7.9	71.5	https://www.instagram.com/spain/	2640	452	15/03/2019
Sweden	https://www.facebook.com/VisitSweden	561183	https://twitter.com/VisitSweden	2.4	28.4	https://www.instagram.com/visitsweden/	1658	222	15/03/2019
Switzerland	https://www.facebook.com/MySwitzerlandUK/	2475280	https://twitter.com/MySwitzerland_e	14.7	93.8	https://www.instagram.com/myswitzerland/	1150	407	15/03/2019
Turkey	https://www.facebook.com/TurkeyHomeOf/	5039956	https://twitter.com/Turkey_Home	6.3	740	https://www.instagram.com/turkey_home/	3623	466	15/03/2019