



THE BENCHMARK FOR HOSPITALITY SOCIAL METRICS



### Before we dig in...



Welcome to the debut State of Social report—the first industry-wide benchmarking report dedicated to social media metrics for UK hospitality brands.

This project was launched by Kitch, a strategic social agency connecting brands with communities, in response to the lack of sector-specific insights for hospitality clients. We were frustrated by how generalised social media benchmarking data often was, with little focus on platforms that can drive significant revenue and brand awareness.

As experts in delivering actionable insights, KAM was a natural partner for this project. Together, we aimed to arm hospitality marketers with the data they need to make strategic decisions at board level and benchmark their performance against competitors.

It can be hard to quantify the true value of an emotional connection sparked by a brand engagement on social media, but there's no denying the monumental impact they can have. This free report aims to provide you with more tools for securing the resources necessary to facilitate these all-important touch points in your customer journey.

A huge thank you to all our participants - we've received a phenomenal response from 62 high-caliber brands in our first year. While contributors receive a detailed summary of the benchmark data, we're excited to share the topline findings in this report.

This is just Year 1 - we've only scratched the surface of what we hope this initiative will deliver in the future. The more people who participate in the State of Social survey, the more valuable it will become. Please encourage your hospitality peers to register for next year and share your feedback to help us grow and evolve.

We hope you enjoy the report!

Susan Zwinkels CMO, Kitch susan@kitchsocial.com





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"This research is timely. As boards look to optimize their budgets, it's marketing spend that is often first in line. This data-driven report shows why your marketing department might just be your secret weapon—with social media as a revenue driver, not a cost center. From benchmarking performance to highlighting best practices, the State of Social is a compelling read for board execs, non-marketers, and marketers alike. Your next quarter's results might just depend on it."

Peter Martin, Co-Founder, Peach 20/20

### What we've cooked up



### State of Social 2025 brands.

62 different hospitality brands, representing over 2,400 sites across the UK, took part.











lucky voice

























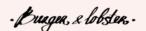
































































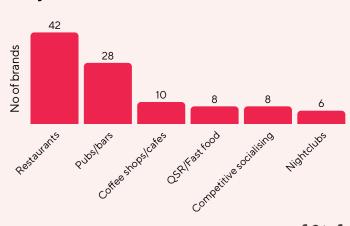
In November 2024, sixty-two hospitality brands completed an online survey which captured thirty-five separate social metrics across three platforms and also responses to twenty-five further questions on how the brands manage social within their businesses.

### The respondent breakdown...

### By estate size:



#### By sub-sector



# The social side of hospitality



Social media is **the cornerstone of successful hospitality marketing**, and for good reason—it's where your customers already spend their time.
Social platforms aren't just places to share food photos (although that happens, a lot); they're where people discover, decide, and connect with your brand.

First, **social media amplifies visibility**. KAM research shows that nearly a fifth of UK adults (18%) will turn to social media when researching a hospitality venue. A well-curated feed or a trending TikTok video can do more for your brand's reach than any flyer ever could.

Second, it creates trust and authenticity. Customers want to know who's behind the brand, what the vibe is like, and what makes your menu and venues unique. Behind-the-scenes content, chef stories, and real-time engagement (like responding to comments or DMs) help humanise your brand and foster emotional connections with followers.

Third, it drives decision-making and footfall. 12% of UK adults say they've visited a venue in the last 3 months based on seeing a social post from a friend.

Lastly, **social media is your pulse on customer sentiment.** By tracking likes, comments, and shares, you can gauge what's resonating with your audience and tweak your offerings accordingly.

In today's competitive landscape, being active on social media isn't just an option - it's essential. It's your direct line to customers, and when done right, it can **turn a quiet Tuesday into a fully booked service.** 

of UK adults will turn to social media when researching a hospitality venue

have made an impulsive visit to a hospitality venue because they saw a post from friends/family

of those who follow a hospitality brand are 100% more likely to feel 'emotionally connected' to that brand

of UK adults follow a pub, bar or restaurant on social media (vs 80% who are on a social platform in general)



### The key takeaways





### 1. Adopt a social-first approach for success

Put social centre stage when planning brand campaigns. Be strategic and use the data at your fingertips to create campaigns that convert - both organically and through paid efforts. Create platform-native content for each channel.



### 2. Create content for your unique brand audience

Tailor content to resonate with each of your brand channel's unique audiences. Align with their values and spark an emotive response. Remember, customers who feel an emotional connection to a brand have a 306% higher lifetime value than those who do not.\*



### 3. Engage and listen to stay relevant

Foster genuine interactions with your community by actively responding to comments, sparking connections and engaging with customers who slide into your DMs. Be in the conversation to stay culturally relevant and identify brand opportunities - surprise and delight your guests.



### 4. TikTok is for the taking

Leverage TikTok's growing influence to tap into a younger, highly engaged audience. Trend-led, the network rewards boldness and favours low-cost UGC-style content. Be prepared to get comfortable with being uncomfortable, your content strategy will look very different on TikTok.



### 5. Audit customer journey and ROI tracking

Audit your social channels to ensure the customer experience is seamless. Set clear KPIs and refine ROI tracking to deliver measurable results, maximise growth and shape future campaigns.

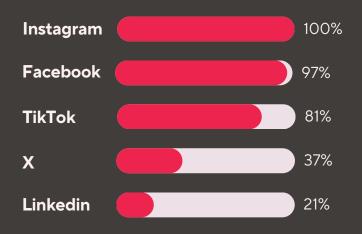




# Setting the social scene...

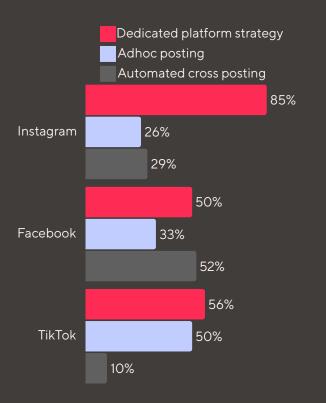


### % brands with a profile on each platform:



### How do brands manage each platform:

 $Nb.\ Asked\ of\ brands\ who\ had\ a\ profile.\ Brands\ could\ choose\ multiple\ options.$ 





The share of hospitality brands actively delivering platform strategies highlights Instagram's priority within the industry. Unsurprisingly, 100% of contributing hospitality brands have a presence on Instagram, with nearly a quarter rolling out local brand pages. Facebook closely follows, with 97% of brands maintaining a presence.



81% of brands have a TikTok profile - the fastest-growing social media platform with over 1.69 billion active monthly users. In 2025, we expect more brands to implement dedicated TikTok strategies and allocate additional resources. Currently, only 56% of these profiles have a clear strategy, many being central brand accounts, leaving a significant opportunity to engage new audiences.



Surprisingly, just 21% of brands have a LinkedIn page, possibly due to being part of larger hospitality groups. Marketers should consider the benefits of a LinkedIn presence, especially for tackling recruitment challenges. With higher engagement than ever, LinkedIn provides an excellent platform to showcase business culture and values.

Reflecting broader social media trends, only 37% of brands maintain a profile on X. The platform has been steadily losing users in recent years, particularly since the U.S. elections.







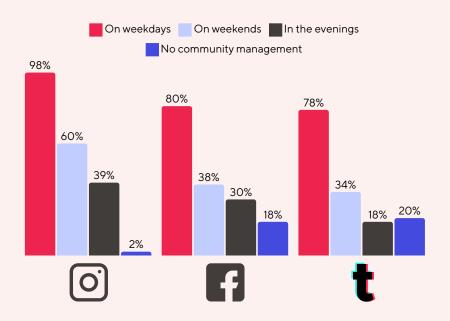
# Community management: don't be late to the party





### When are brands actively engaging in community management?

Nb. Asked of brands who had a profile. Brands could choose multiple options.



Many brands fail to listen to or engage with their audience during key service periods, such as evenings and weekends. In an industry that thrives 'out of hours,' community management should mirror the experience customers have in the venue.

Treat your online customers as you would in person - this means having the infrastructure to promptly address complaints and comments as they arise.

Social media's influence is deeply embedded in today's culture and individual decision-making. To stay relevant:

- Elevate community management beyond basic monitoring and customer service.
- Be part of the conversation interact with customers and build genuine connections.
- Drive real-time interactions through humour.
- With more people "running to the comments," make sure to show up there.
- Engage with creators whose audience demographics and values align with your brand
- Listen to and embrace what people are saying about your brand.

La Vieille Ferme Rosé demonstrated this perfectly by listening to consumers and cleverly rebranding their label to '<u>The Chicken Wine</u>,' resulting in viral social coverage.



# Content creation: phones are allowed at the table







### What style of content do hospitality brands use on social?



### Annual budget for content\*:

Median: £12,500 Highest: £111,000

\*based on 28 brands

\*LIMITATIONS WITH BUDGET DATA: While 62 brands contributed to the State of Social report, only 28 shared budget insights for content. The data also has limitations, lacking clarity on whether the investment extended to local sites and if content creation budgets accounted for other marketing channels alongside social. We've included the data to provide an indication but will refine our approach to collecting this information next year.

## The Alchemist: engagement strategy

The Alchemist has historically thrived on social media engagement but observed a decline in user interactions across platforms in early 2024, despite strong sales. In June, they launched an initiative focused on increasing the engagement metric - defined as likes, shares, saves, and comments - rather than impressions or views. The goal was to foster more meaningful brand interactions to encourage guest visits.

The team doubled down on boosting engagement among its existing social media followers. They analysed brand followers on each network and tailored their content strategy to align closely with the unique audience dynamics. For example, TikTok prioritised humour and relatable content targeted organically at a female audience, while Facebook focused on an older demographic, emphasising quality and value-driven offers.

Instagram emerged as the clear leader in engagement, with viral moments driven by comedy and skit-style content, resulting in a remarkable 1,474% increase in engagement. This success highlights the impact of data-driven content planning and the importance of adapting to audience expectations to drive significant growth across social media channels.

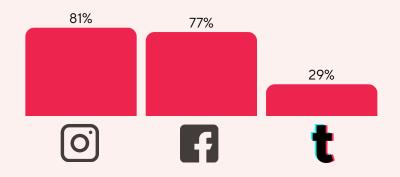


## What are brands favouring on the social menu?



### % who have a paid ads strategy

(of those who use the platform):



#### What types of brand partnership activity are taking place?

Competitions	62%
Stories	41%
Influencer marketing	37%
Events	29%
Ads	15%
None of the above	19%

### Do brand strategies include the following influencer marketing?

Gifted influencers	76%
PR press invites	60%
Paid for influencers	37%
Reactive opportunities only	27%
Affiliate marketing	5%
None of the above	6%

#### **ANNUAL BUDGET\*:**

	BRAND PARTNERSHIPS	INFLUENCER MARKETING	PAID ADS*:
Median:	£8,500	£6,000	£22,000
Highest:	£34,950	£50,400	£250,000
	*based on 10 brands	*based on 28 brands	*based on 33 brands



The majority of brands manage paid ads inhouse, with just over 1 in 4 using an agency. Confidence in Meta ads remains high, proving that Facebook is far from dead - it continues to be a valuable channel for driving returns.

Fewer marketers are investing in TikTok advertising, and the budgets allocated are roughly a third of those for other channels. This presents a significant opportunity for early adopters to gain an edge over competitors.



Four out of five brands are engaging in some form of brand partnership activity. Of these, 81% manage partnerships in-house, while 13% work with an agency. Often driven by supplier contacts, authentic collaborations designed with the customer in mind are the most successful. Honest Burgers are experts at this, showcasing a one-of-a-kind local burger at each of their sites, always paired with a beer from a local brewery.

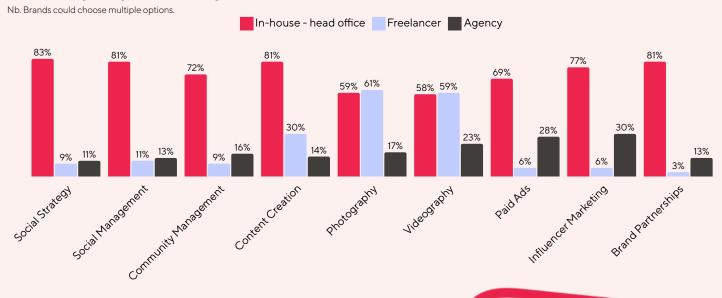
### INFLUENCER MARKETING

While 77% of brands manage influencer marketing in-house, the level of investment varies greatly, with 27% only engaging in reactive opportunities. Additionally, only 5% are utilising affiliate marketing - an untapped channel with the potential for driving footfall to venues.

# The no.1 challenge for brands in 2025 is 'limited resources'



#### How do hospitality brands manage their social?



1.8 On average, hospitality brands have 1.8 people managing their social in-house.

#### What influences how social is managed?



"Our main focus for 2025 is to make the most of our social resource and do more with less. We need to figure out a plan for growth and how we can continue to meet the needs of our venues without increasing the size of our team."

"There's a constant battle between not having enough resource and ambition to always be better. I'm looking forward to using 'The State of Social's' insights to empower and inform my future board room chats on the importance of hiring specialist social roles so we can continue to grow and lead from the front."

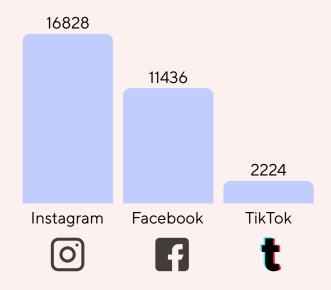
Ruth Carpenter, Head of Marketing, Pizza Pilgrims



# Meet the hospitality followers...



### Median no. of followers by platform:



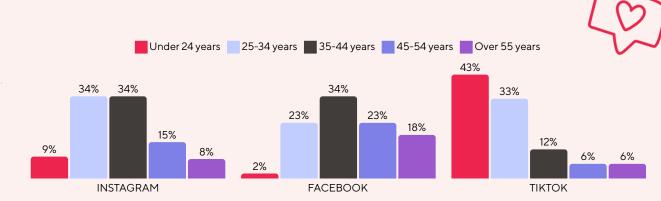
The benchmark followers by platform reflect the channel's maturity and brand uptake.

The biggest surprise in hospitality is that, on average, only 9% of Instagram followers are under 24 years old, compared to the global average of 38%. This underscores the importance of adopting TikTok to target the next generation of customers.

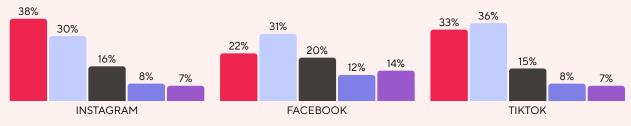
On TikTok, 80% of followers are under 34 years old, representing the youngest demographics in hospitality. However, it's not solely Gen Z, as many assume. To capture this audience, with higher disposable incomes, brands should create viral, "must-have" experiences.

Meta-owned channels remain crucial for reaching older audiences, with 84% of Instagram followers aged 25-54 and 74% of Facebook followers over 35.

### Age breakdown of followers (hospitality brand average):



### Vs global average by platform:



Source: We are Social, Instagram, DataReportal, Meltwater



# Quality over quantity of posts, always.









#### **NO. OF FOLLOWERS**

.....

16,828 11,436 2,224

#### **NO. POSTS/WEEK**

(incl photos, videos AND reels) - median

Hospitality industry
4.0
3.3
N/A
UK all industries comparison
4.2
4.7
1.9

\*Source: RivalIQ

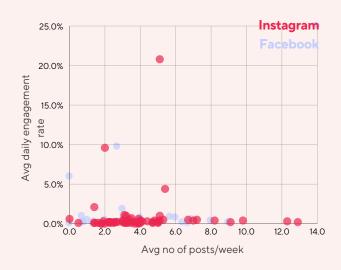
#### **AVERAGE DAILY ENGAGEMENT RATE\***

median

Hospitality industry 0.2% 0.1% 2.1% UK all industries comparison 0.4% 0.1% 2.6%

Source: RivallQ

### Post frequency vs ER by individual brand:



This is our preferred formula for showing an engagement rate over a period of time, as recommended by Hootsuite. NB the median of all of the individual hospitality brands' 'average daily ER' is shown. The RivallQ industry comparison is calculated slightly differently but is the closest credible comparison available: Engagement rate = Total engagements / total number of followers \*100

There is no clear correlation between posting frequency and engagement rate. Ultimately, the strength of a social strategy depends on a brand's ability to understand each platform's unique audience. A Sunday roast post will inevitably perform better on Facebook, while a "splitting the G" on a Guinness video will feel right at home on TikTok.

The quality of content is more important than quantity. It must connect your story to the viewer, evoke an emotional response, and drive engagement.

While a handful of brands have led the way with scroll-stopping results, the hospitality sector's overall performance remains close to the UK average. Posting frequency on Instagram is also in-line, and while less content is being shared on Facebook in hospitality, it continues to drive brand engagement.

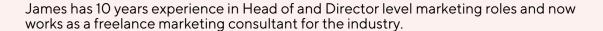




<sup>\*</sup>Ave daily engagement rate = Total engagements for X days / (X \*followers) \*100  $\,$ 

### **Baking social into your** wider marketing strategy

by Freelance Marketing Director James Mobbs





"For me, there's 3 main things to consider with social media and its role within the marketing and operational functions of a hospitality business...



### COFTEN THE FIRST & LAST IMPRESSION

In the 'operational world' of hospitality everyone knows how important that first and last impression is. Throughout pretty much every mystery diner, operational audit or feedback survey we ask about impressions on arrival and on leaving. They set the scene and complete the journey.

In reality though, guests have already interacted with your brand multiple times before ever stepping foot in your door. Social is often the first place they turn to when in discovery mode and the last place they go to either praise or complain.

Underestimate the importance it plays in terms of guest sentiment at your peril. You wouldn't not answer the phone or respond to emails after opm in the week or at weekends, and neither should you ignore these channels at those times. Community management and nailing your brand communication here can quite literally make or break the overall guest experience.

### WHEN (AND WHEN NOT) TO FOCUS ON ROI

Let's cut to the chase, your restaurant wasn't quiet on Sunday because there wasn't a photo posted on Instagram about your Sunday roast. It was quiet (or busy) due to a huge number of factors.

Social is a tool of many faces and many facets. Some of those are to drive revenue, some to grow awareness, some to increase engagement. Think of it as A-B-C. You want to get the Conversions, but before doing that, you need to grow Awareness and influence Behaviour. You have to go through A and B to get to C.

The vast majority of the work on social is not about conversions, but about growing awareness and influencing behaviour. Their goals are reach, engagement and interaction, not sales.

ROI should really only be discussed when talking about paid ads if the objective is to get bums on seats, and in this instance you absolute must know the ROI.



### **AUGMENT SOCIAL WITH OTHER DATA**

One of the biggest challenges is where your social data sits alongside the rest of your guest data. Your CRM should be pulling data from bookings, WiFi, feedback, loyalty, ePOS, gift cards and in some instances your website data, but rarely can it combine any of that with your social data.

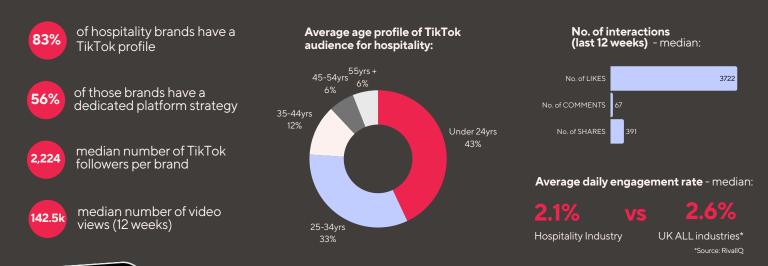
Ideally your CRM can build custom audiences to push into your Meta account for targeted ads, but if not you can still create those audiences and export them. In some instances I've seen a 200% increase in paid ad R.O.I. when doing this at scale.

The other thing to consider is how you can use social to drive database and CRM growth. Competitions are a great way of doing this. Instead of focusing on share / comment / like, run a paid competition where you have to complete a Meta form to enter. Then export that data back into your CRM. You can get opted-in contacts on your database for as little as 15p.



# TikTok: a recipe for success







### How to nail TikTok

### 1. Lead with trends

Trends are key for TikTok success, and tools like Creator Search Insights help you find what's popular in your niche. The 'Content Gap' tab shows what people are searching for but isn't being served. Quick reactions and short sign-offs are essential for staying relevant.

#### 2. Entertain

Identify what resonates with your audience and use UGC-style content to play on this. Leverage familiar behaviours to spark engagement (like curry sauce vs. gravy with chips), and use text overlays to grab attention within 0.2 seconds. Mascots can also humanise your brand and keep things consistent through team changes.

### 3. Target customers via ads

A paid strategy isn't essential but highly desirable. Boost results with Spark Ads, which amplify organic content through native integration. Integrate customer data to build social audiences, allowing you to target existing customers or create lookalike audiences. Be cautious with restrictions, especially around alcohol promotions, as even subtle imagery can be flagged.

#### 4. Harness the power of creators

Creators are TikTok's secret weapon - take their lead! Work with them through paid or gifted collaborations and create in-venue experiences that attract them naturally - check out <u>Onda's viral tiramisu drawer</u>. With 77% of users discovering products on TikTok, let influencers showcase your brand authentically - outward selling doesn't work.

#### 5. Utilise employee-generated content

EGC (Employee-Generated Content) is the new UGC, offering authentic, relatable content that builds trust and highlights the human side of your business. Brands see the most success when they allow creative freedom, so trust your team - especially your Gen Z employees.

#### 6. Have fun!

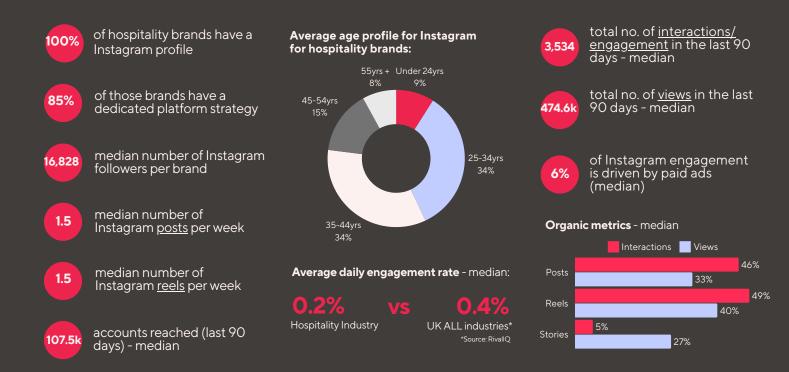
Don't be afraid to experiment - TikTok rewards boldness and creativity. Post consistently (3x a week is enough), use analytics to refine, and stay flexible. Most importantly, don't overthink it - just go for it!





### Instagram: let's tuck in







### Instagram updates...

- The Tall Grid has launched for profiles. <u>Instagram stated</u> they intend to give creators more control with a simpler, cleaner feed. Customisable thumbnails are also on the way!
- To prioritise main feed content, Instagram is moving highlights into a tab format on the grid.
- Instagram developers are building a tool that will allow you to reorder your entire grid and post directly to it, bypassing users' feeds entirely.
- New feature: **test your content via Instagram trial reels**. These are shown to non-followers first, allowing brands to experiment with content before sharing it with followers.
- Instagram's **new '<u>Edits'</u> app is pending** launch a full suite of creative tools in a standalone video editing app.
- A **new <u>"View Rate"</u> metric** is being introduced, highlighting the importance of the hook. It will show what percentage of followers continue to watch after the first 3 seconds.
- Messaging is a top priority for <u>Instagram in 2025</u>, expect improved tools and analytics to support how users primarily share on the platform.





### **2025 Ranking...**

Instagram has shared its algorithm's top-ranking signals for this year:



- Watch time
- Likes
- Sends

For connected reach - accounts that follow you, likes will take greater priority. While sends rank higher for unconnected reach - accounts that don't yet follow you.

# Facebook: from feed to fork





of those brands who have a Facebook profile also have a paid ads strategy

Average daily e

23%

O.1%

number of Facebook posts
per week - median

Average daily engagement rate - median:

.1% VS 0.1%

Hospitality Industry UK ALL industries\*

\*Source: RivallQ



### Al: serving up content

35-44vrs

From Al-powered video editing tools to image generation, hospitality brands are capitalising on Al's content creation capabilities. Marketers are using it to amplify new openings, promote competitions, drive gift card sales and capture followers' attention. The key to harnessing Al effectively lies in mastering the art of prompt creation.

Tread carefully - brands have been called out for misusing AI. Last year, SheerLuxe faced backlash over the announcement of its AI-enhanced virtual assistant, Reem. However, credit where it's due - the team responded appropriately, apologising and stating, "We'll keep innovating, but we are listening and, in the future, will explain such newness better to our readers."



### The winning recipe:

**CASE STUDY** 



### Bill's: Kids Eat Free

Crowned **Best Digital Engagement at the 2025 RMI Awards**, Bill's Kids Eat Free campaign ran throughout the 2024 summer school holidays. Recognising families as one of their key audiences, Bill's aimed to alleviate some of the financial pressures facing households.

Digital activations spanned multiple channels, including social media. The team leveraged valuable CRM data from Airship to build targeted audiences for paid campaigns, delivering exceptional results.

Restaurants thrived with families throughout the summer, with teams focused on creating a nostalgic connection with kids, ensuring they would fondly remember Bill's as they grew older. To elevate the children's experience, a QR code was added to the menu, linking to interactive digital games. Featuring Frank, their founder's dog, the games were played by 32,000 kids!

#### **ORGANIC SOCIAL**

Impressions: 6.2K

Engagement rate: 2.5%

#### PAID SOCIAL

Impressions: 9.5M

Link clicks: 16K

Table bookings 5

#### **MUMSNET INFLUENCERS**

Impressions: 20K

Engagement rate: 2.4%

#### **SALES RESULTS**

includes CRM, digital display and Mumsnet partnership activations

Family covers: 172.6K

Participation: 38.43%

"Our Kids Eat Free offer was first launched in the summer of 2022, better each year. With families heing one of our key audiences, audience. Kids Eat Free campaign of 2024."









# What's on tap in 2025?



Key challenges and focus areas for social teams in hospitality for the year ahead...

### 1. Driving growth with limited resources

Hospitality brands face challenges in social media management due to limited budgets, time, and headcount, often compromising content quality and quantity. Stretched teams frequently manage multiple accounts or brands, while the diverse skills required for each element of a social strategy add further complexity. In 2025, brands will prioritise strategy, optimise resources - particularly employee-generated content, and invest in specialists to enhance their impact on social.



### Navigating algorithms and trends



Teams will focus on becoming more reactive and trend-driven in their social strategy, learning how to capitalise on platform-specific trends while still aligning content with their brand voice and values. As always, there will be a constant focus on how algorithms are evolving. While Social SEO remains a priority, marketers should also consider social media's influence on Google's Al-generated overviews - snapshots created in response to search queries. Keep your radar open for growing opportunities on other platforms too, such as Substack and Rednote.

### Proving ROI and internal buy-in

Now more than ever, operators are doubling down on data. Audit your customer journey to ensure they're accurately tracked, utilising tools like Meta and TikTok pixels, UTM codes, and website traffic to measure ROI. Review your tech stack and dive into your CRM data to gain advanced audience insights that can inform your paid social strategy. Marketing teams will continue to face internal challenges in proving how social drives sales, so be sure to share qualitative data to highlight its ability to build emotional connections at a human level and positive brand sentiment.



### Elevating content strategy

Brands are focused on creating engaging, high-quality content that resonates with their audience to increase reach and drive results, turning viral moments into real engagement and bookings. Emphasis will be on video content, including vox popstyle videos and authentic brand storytelling. UGC and creator partnerships will play a key role, with teams leveraging hyper-local influencers. Some businesses are consolidating social accounts to streamline efforts and create a more cohesive, datadriven brand presence across platforms.



### Expanding TikTok presence

t

In 2025, TikTok will be a key growth area for hospitality brands, with a strong focus on converting virality into meaningful in-venue results. Brands will need to educate internal teams on TikTok-native content and the importance of quick approvals to capitalise on trends and entertainment-first content. Much like Instagram a decade ago, TikTok offers a unique opportunity for hospitality brands to reach new audiences. Marketing teams should look to other industries to gain insights on how to effectively leverage the platform. And if expanding to a U.S. market, be mindful of political influence by diversifying channels.







# The secret sauce for social in 2025



Trends from Kitch for the year ahead



### **Data-driven social strategies**

Hospitality marketers have a wealth of customer data at their disposal. If you're not already, you should be leveraging this data to build informed social audiences. Whether you're retargeting existing customers or creating lookalike audiences, use your customer insights to improve targeting and drive better results with paid advertising. Tailor the campaign to the platform and review the value exchange to convert more bookings, sign-ups, and engagements via social.







### **Employee-Generated Content**

Harness the creative talent within your business by incentivising employee-generated content (EGC). Brands report the most success with EGC when employees are given the freedom to create.

### Remember:

- Your team knows your brand
- EGC builds trust with your audience
- Trust your talent particularly Gen Z

Your content strategy will thrive with EGC, delivering relatable content that showcases the people behind your brand.







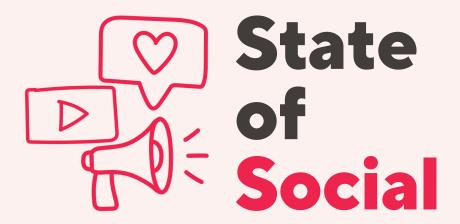
### Prioritise messaging for metrics

To combat dark social - untrackable online conversations - focus on direct messaging. Shift consumer behaviour by promoting inapp sharing over links to private channels like DMs, email, WhatsApp, and SMS. Create shareable content to drive measurable brand engagements, as these interactions can represent a significant portion of your traffic and influence customer decision-making.

Nurture private communities to engage your most loyal fans. Instagram's Broadcast Channels offer an excellent opportunity to connect with your most dedicated audience on a deeper, more meaningful level.







THE BENCHMARK FOR HOSPITALITY SOCIAL METRICS

Interested in taking part in future waves of State of Social research and getting the full benchmarked results?

Register your interest <a href="here">here</a>:





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