

# State of Social

THE BENCHMARK FOR HOSPITALITY SOCIAL METRICS

JANUARY 2026

**KAM** x **Kitch**

# Welcome to the State of Social.



"Welcome to our second State of Social report. What began as the first dedicated benchmarking study for UK hospitality social performance has now grown, with 10% more contributors and the same high calibre of brands shaping this year's results.

Hospitality has proved itself resilient once again. Yet the landscape is more volatile and competitive than ever, demanding that operators pull every lever available to engage customers meaningfully. The brands thriving today are those nurturing authentic guest connections, building communities rooted in real conversation and creating moments people want to share.

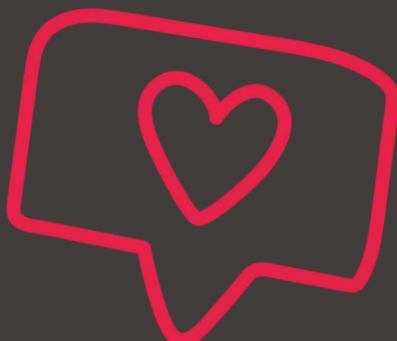
This year's findings highlight how central social channels are to customer decision-making. With social SEO on the rise and AI reshaping how people find and choose venues, brands must stay visible and relevant on the platforms their audiences use every day.

Kitch launched this initiative to give marketing teams the sector-specific insight they had been missing. Partnering with KAM has enabled us to deliver clear, actionable intelligence that reflects the realities of hospitality and supports brands in elevating their performance.

Thank you to every participant for shaping this year's benchmarks. While contributors receive a full breakdown of the data, we're pleased to share some topline findings here. We encourage you to share the report with peers, send us your feedback and help us continue strengthening this industry-wide initiative.

**Let's keep raising the bar for hospitality on social!"**

**Natalie Dunning**  
**CEO & Founder, Kitch**  
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"Understanding your customers' digital behaviour isn't just a 'nice to know'. It's a red-hot commercial advantage.

The State of Social report is a vital read for growth-minded hospitality leaders. It reveals which channels deliver value and how to align your brand, offers and loyalty strategy with the platforms that matter. It strips out the guesswork, sharpens investment decisions, and gives real-world insight into how social drives revenue and reputation."

**Christine Martin, co-founder Peach 20/20 and Boardwalk**

# What we did.



## State of Social 2026 brands.

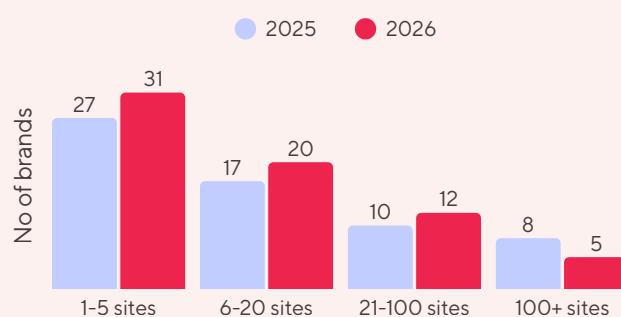
68 different hospitality brands, representing over 1,900 sites across the UK, took part.



In November 2025, 68 hospitality brands completed an online survey which captured 43 separate social metrics across three platforms and also responses to 35 further questions on how the brands manage social within their businesses and what the future might hold. In certain areas of this report we have drawn comparisons against the 2025 State of Social results; it is worth noting that despite 43% of the brands being new in 2026, the overall make-up of the sample is comparable with a slight decrease in brands with over 100 sites and a slight increase in competitive socialising brands.

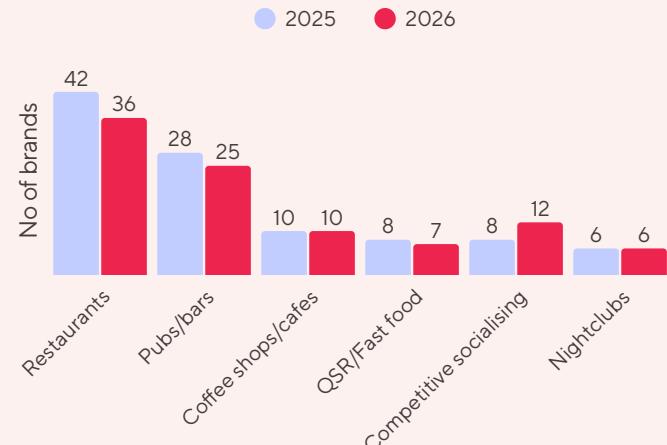
## The respondent breakdown...

### By estate size:



### By sub-sector

Brands could classify themselves as falling within multiple sub-sectors



# Social has a critical role in engaging guests, growing loyalty and driving footfall



"In 2026, social media isn't optional for hospitality- it's a cornerstone of how people discover, choose and visit pubs, bars, restaurants and venues across the UK. With **54.8 million active social users (79% of the population)**, the scale is undeniable. But what matters most is how many of these users hospitality brands can reach on the platforms they use every day: 1-in-4 now follow a hospitality brand.

The big players remain central to UK social life. Adults now spend, on average, **1 hour 48 minutes a day on social media**- a slight dip compared with last year, but still a huge window for brands to influence decision-making. Increasingly, social is the first step of the customer journey; instead of relying on Google searches or word-of-mouth, venues are being discovered directly through the 'scroll'. AI searches are increasingly prevalent too- and expected to grow.

According to KAM, **18% of UK adults use social when researching a venue**, confirming that social is not just inspirational but a core part of decision-making. Followers are also far more likely to feel emotionally connected to a brand which is a key driver of loyalty, vocal advocacy and forgiveness when things go wrong.

Social also sparks spontaneity. 13% of UK adults say seeing friends or family out on social media motivated them to visit a venue they weren't planning to. And because hospitality is all about experience, atmosphere, people, community- social media's ability to show "vibe" rather than just menus makes it uniquely powerful.

Our research shows that your guests are already turning to social to connect, discover what's new and decide where to go. When social drives real-world visits, the effort and investment behind doing it well is always worth it."

**Katie Jenkins, Marketing Director, KAM**



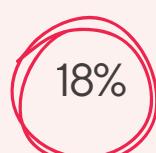
of UK adults are active social media users\*



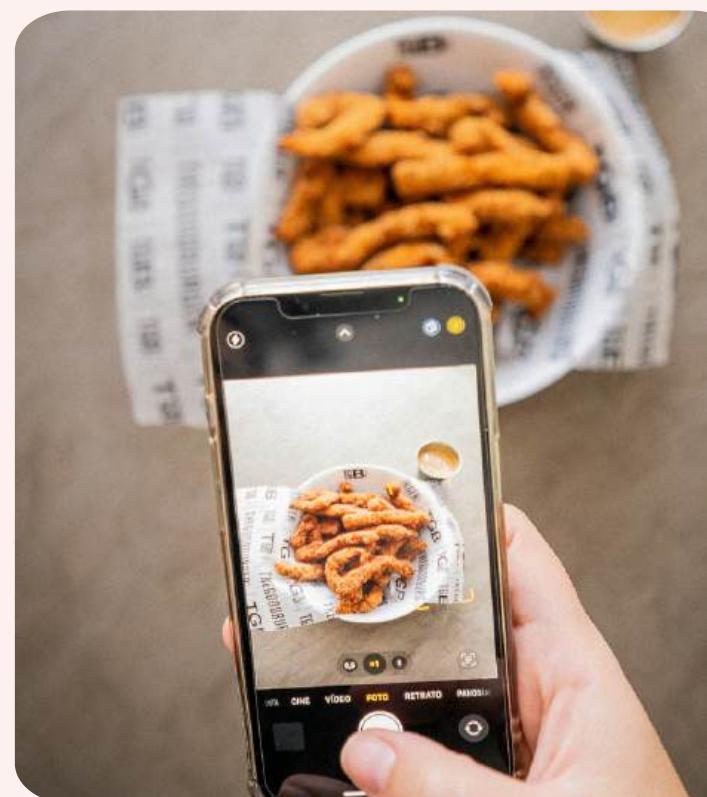
of UK adults follow a pub, bar or restaurant on social media



Average time UK adults spend on social media per day\*



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



# The current state of play.



**Social is business-critical but teams are under-resourced**  
Impact is rising faster than teams, budgets and specialist skills.

**Instagram remains the industry anchor, but growth is harder to unlock**  
Every brand is active and audiences continue to grow, but engagement has flattened. Growth now comes from quality, not volume.

**TikTok rewards commitment**  
Slightly fewer brands are active on TikTok than last year, but those investing properly are seeing stronger reach, engagement and an older audience profile. TikTok is no longer experimental, it rewards commitment and clarity.

**Paid now dominates Facebook performance**  
Organic performance continues to decline as paid activity drives the majority of reach and interaction, with Facebook now shifting from a community channel to a performance and conversion engine for many.

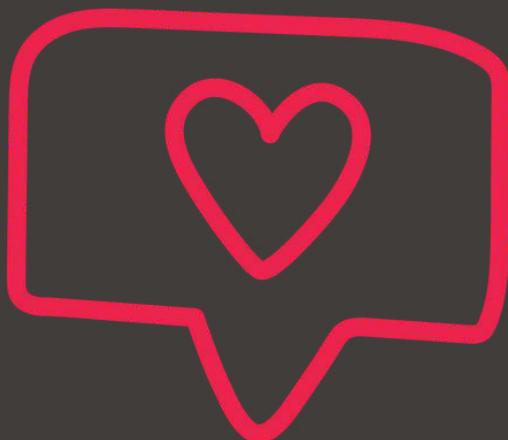
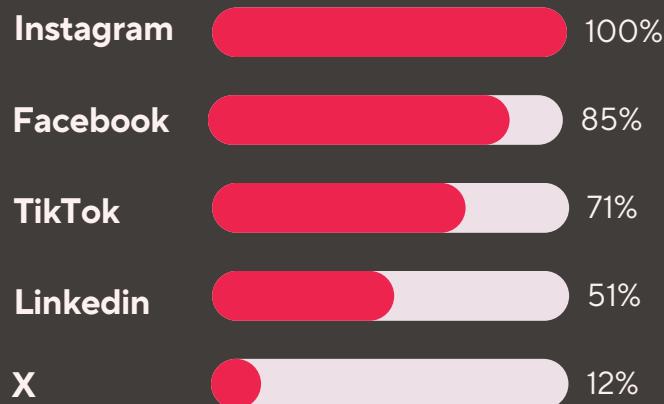
**LinkedIn is moving into the mainstream for hospitality**  
Employer branding and people stories are driving rapid adoption. Hospitality brands are increasingly confident using LinkedIn to tell their people story.

**Authenticity leads creative**  
Brands are leaning into faster, more relatable content- from UGC-style posts, to staff-led storytelling. Professional shoots still matter, but authenticity now leads creative strategy.

**Community management remains a major blind spot**  
Audiences are active out of hours. Brands often aren't and are visible in feeds but not always present in the moments that matter most.

**Tracking and measurement are still holding brands back**  
Many brands still lack clear attribution, platform-specific KPIs or visibility on how social drives bookings and footfall. As social becomes more commercial, the inability to prove impact risks undermining future investment.

## Percentage of hospitality brands with a profile on each platform:



# Social teams remain small and overstretched



1.3

On average, hospitality brands have 1.3 people managing their social in-house

63%

of brands have a dedicated social media manager(s)

87%

of brands use an agency or freelancer to help manage at least one element of their social strategy

28%

of brands intend to grow their in-house social team in 2026

Hospitality social teams are still small, averaging just 1.3 people. Even though social drives awareness, loyalty and bookings, over half of brands (53%) don't plan to change their team size in 2026. This creates a clear gap between expectations and what teams can realistically deliver.

## By estate size

**Small estates:** Often stretched, with social handled as part of a wider role. There are big ambitions, but not enough time to be consistent or strategic.

**Mid-sized estates:** Show the strongest structure. They're more likely to have someone who truly owns social, which leads to clearer planning and better results.

**Enterprise estates:** Produce high volumes of content and run busy channels, but still hesitate to grow their teams, even when demand is increasing.



When asked 'what is the biggest social media challenge your brand is facing right now?...'

c1-in-2

mentioned **limited time, small teams** or **lack of dedicated social resource**

# The knowledge gap: Measuring success



Many teams can create content and manage day-to-day activity, but lack the strategic skills to link social to conversions and commercial results. This means brands are often active on social, without being set up to properly measure or maximise the value it can deliver.

Our 'State of Social 2026' data brings this to life, showing that **only 56% of brands can track bookings or conversions directly from paid ads**, meaning that almost half (44%) still can't confidently link their activity to commercial outcomes. Within that 44%, 19% say they plan to start tracking this year.

The same story shows up in audience strategy.

**59% of brands use customer data to build paid audiences**, meaning 41% are still running campaigns without leveraging their own customer insight. That limits targeting accuracy and weakens their ability to optimise spend towards meaningful, measurable results.

Together, these gaps show that while brands are busy on social, many don't yet have the strategy, data foundations or measurement in place to turn that activity into commercial impact.

## Top 3 KPIs used for evaluating ORGANIC performance on social:

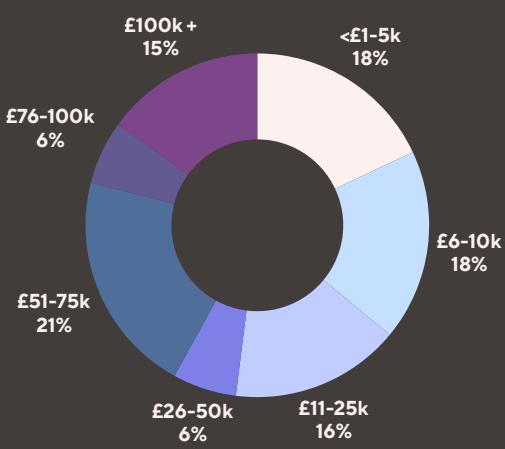
1. Engagement
2. Follower growth
3. Reach/impressions

% who don't actively evaluate organic performance = 3%



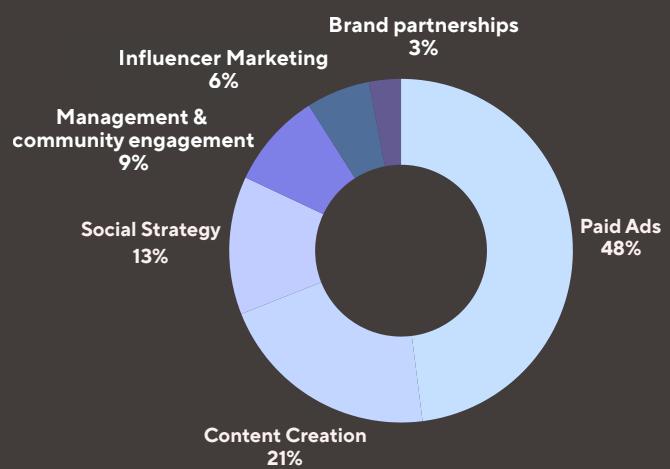
## Total annual budget for social media:

(NB. these figures are based on feedback from 49 brands who know their budget and were willing to share)



## Average distribution of budget:

(based on a sample of 49 brands)



# Collaboration is the new algorithm

by Glenda Barber



## How hospitality marketers are driving stronger social results by sharing, not competing

In marketing, it can feel like everyone talks about the algorithm; how to beat it, how to keep up with it, how to guess what it will want next. The platform updates, the format shifts, the “this week’s trending audio.” But the biggest shift in social media performance across the hospitality sector right now isn’t happening inside Instagram or TikTok. It’s happening between marketers themselves.

The brands making the strongest creative work, building the most loyal guest communities, and responding fastest to cultural moments aren’t those who’ve unlocked some hidden platform trick. They’re the brands whose marketers are connected to each other. They’re part of shared community spaces where learnings and insights move freely, often with collaborative supplier relationships.

The real competitive advantage is no longer what you know, but who you learn with.

### The rise of the collaborative marketing culture

Hospitality has always had a sharing mentality: if you love something you’ve eaten, you’ll talk about it. You’ll ask how it was made. You’ll share it. Social media operates in the same spirit.

What’s emerging now is a more generous culture. Marketers are increasingly sharing:

- Creative formats that are working (and those that aren’t)
- Effective frameworks, tools and tech to support in-house efficiencies
- Benchmarks for engagement and reach across different venue types
- Sharing new content trends or shifts in audience behaviour
- Lessons learned from influencer partnerships or paid campaign tests

This isn’t about revealing trade secrets. It’s about raising standards across the sector together. When one marketer tries a new approach to TikTok and it lands, five others don’t need to spend time reinventing the wheel. When one brand learns that a carousel outperforms reels, the insight travels faster. When someone shares the one sentence that finally got Ops on board with an influencer campaign, that sentence gets reused again, and again, and again. The work gets better, because the *thinking* gets shared.



### Why collaborative benchmarking beats competitive secrecy

Traditional thinking says: *Don’t show your hand. Protect the strategy. Keep the data close.* But guests don’t “pick a brand” and stay loyal for life. They choose based on occasion, location, price, mood, convenience, trends and a huge range of emotional cues.

In other words: you are not really competing in the way we used to think of competition. Your audience is shared. Your challenges are shared. Your pace of work is shared. So your learnings should be shared. While keeping things private used to look like competitive advantage, it’s increasingly becoming a liability.

The brands who will win the next era of hospitality social media aren’t the ones that cling to their knowledge, they’re the ones building and sharing.

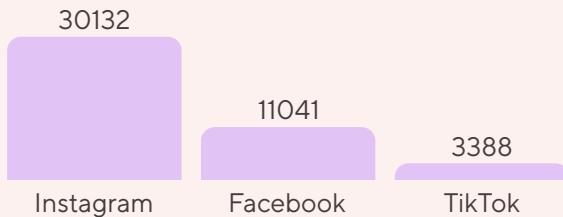


**Glenda Barber is a Freelance Marketing Consultant at Bloom Marketing and Community Lead at Team Marketing**

# Meet the hospitality followers...

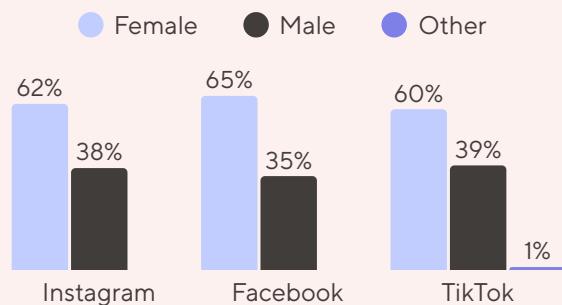


## Median no. of followers by platform:



## Gender split of followers

(hospitality brand average):



## Vs UK average by platform\*:

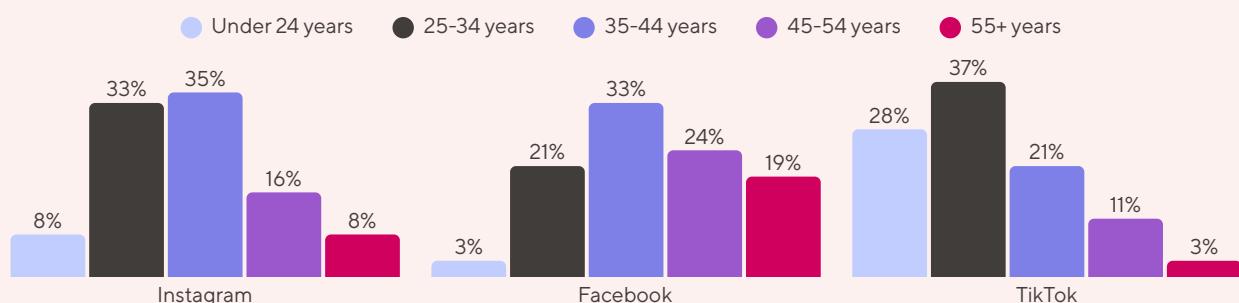
55% female      53% female      52% female

Hospitality brands attract a slightly more female-skewed audience to their social channels when compared with the UK platform averages.

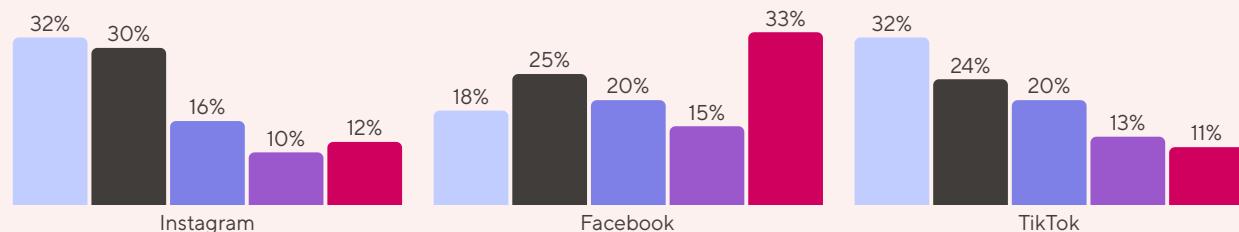
Age-wise, Instagram attracts a much higher proportion of 35-44 year olds, while under 24 year olds are significantly under-represented compared with UK baselines. Facebook follows a similar pattern.

Overall, hospitality brands attract predominantly female audiences and over-index in 25-44 year olds, reflecting the sector's strong appeal among socially active consumers who use platforms to discover places to eat, drink and go out. (Various research studies suggests that those who identify as female have the biggest influence over when their family eats out and what venues they visit.)

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



## Vs UK average by platform:



Source: \*NapoleonCat.com

# Instagram remains the flagship platform, but performance is flattening.



**100%** of hospitality brands have an Instagram profile

**90%** of those brands have a dedicated platform strategy

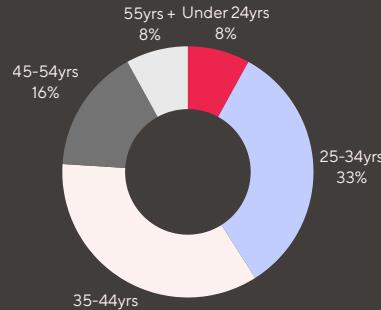
**30,132** median number of Instagram followers per brand

**4** median number of Instagram posts/reels per week

**861k** total no. of views in the last 90 days - median

**127k** accounts reached (last 90 days) - median

## Average age profile for Instagram for hospitality brands:



**62%** of hospitality Instagram followers identify as female

## Average daily engagement rate - median:

**0.2%** vs **0.4%**  
Hospitality Industry vs UK ALL industries\*

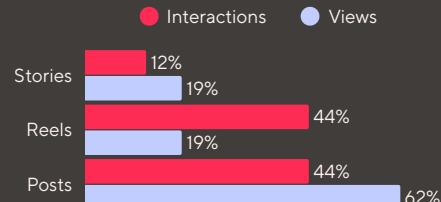
\*Source: RivalIQ

**5,462** total no. of interactions in the last 90 days - median

**64%** of Instagram interaction is driven by followers (median)

**16%** of Instagram interaction is driven by paid ads (median)

## Organic metrics - median



**9%** have an Instagram broadcast channel

Instagram continues to be the hero platform, with every contributing brand active for the second year running. Audiences are still growing, rising versus last year, while engagement rate holds at 0.2%. Posting sits at around four posts or reels each week, showing that activity is consistent even as overall performance evens out.

Content format plays a major role in results. Reels generate 44% of interactions but only 19% of views, making them the strongest driver of engagement. Posts deliver 62% of views and 44% of interactions, offering broader reach and a more balanced performance.

Across sub-sectors, restaurants maintain a balanced mix of posts and reels. Competitive socialising brands and nightclubs see the highest value per reel, while smaller estates lean more on posts, mainly due to limited video resource. Larger estates use reels to spotlight hero moments and posts to keep the brand consistent, with paid support helping them maintain reach at scale.

Where things are shifting is in how brands build closer community spaces. Broadcast channels are still in the early stages, with only around 9% adopting them so far. Another 7% are planning to introduce one in the next year, signalling growing interest in more direct, one-to-many communication. Most brands haven't made the move yet, but curiosity is rising as teams explore new ways to create more immediate, personal connection with their audiences.



# TikTok adoption dips as impact grows and audiences mature.



**71%** of hospitality brands have a TikTok profile

**63%** of those brands have a dedicated platform strategy

**3,388** median number of TikTok followers per brand

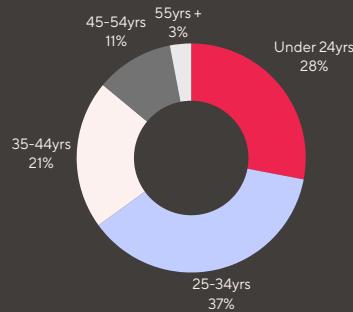
**2** median number of TikTok posts per week

**Average daily engagement rate for TikTok** - median:

**2.3%** vs **2.6%**  
Hospitality Industry      UK ALL industries\*

\*Source: RivalQ

**Average age profile of TikTok audience for hospitality:**



**114.5k** median number of video views (12 weeks)

**3,071** median number of profile views (12 weeks)

**36k** median reached audience (last 12 weeks)

**5,427** median engaged audience (last 12 weeks)

**60%** of hospitality TikTok followers identify as female

**No. of interactions (last 12 weeks)** - median:

No. of LIKES	3156
No. of COMMENTS	49
No. of SHARES	923

TikTok adoption has dipped slightly this year for hospitality brands, yet the brands that remain active are seeing stronger results. Engagement rate has risen slightly, and while follower numbers are still modest, reach continues to be impressively high.

**More hospitality brands are approaching TikTok with clearer direction**, the number saying they have dedicated strategies has risen from 56% to 63%. For those that do put budget behind TikTok (27%), the platform now accounts for an average of 17% of paid social spend.

Across sub-sectors, restaurants and cafés are benefiting from the rise in older audiences. QSR and nightclubs continue to resonate with younger users while gaining momentum in the 25+ segment. Smaller estates post less often but still enjoy strong reach, and enterprise estates attract broader demographics through scale, supported by creators and Spark Ads that help content travel further.

The creative landscape on TikTok is shifting as well. Brands that rely too heavily on repeated trends are seeing less impact as audiences become more selective. The ones breaking through are those showing personality and originality. **TikTok is increasingly where the next generation of hospitality heroes are built, and the brands that show up with confidence and a clear voice are the ones gaining ground.**

# Facebook continues its shift into a paid only channel.



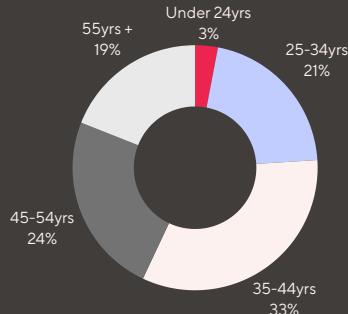
**85%** of hospitality brands have a Facebook profile

**47%** of those brands have a dedicated platform strategy

**11,041** median number of Facebook followers per brand

**4** number of Facebook posts per week - median

## Average age profile for Facebook for hospitality brands:



**65%** of hospitality Facebook followers identify as female

**2,650** total content interactions in last 90 days - median

**32%** % of interactions from followers - median

**81%** % of interactions from paid ads - median

**969k** total number of views in last 90 days - median

## Average daily engagement rate - median:

**0.4%** vs **0.1%**

Hospitality Industry

UK ALL industries\*

\*Source: RivalIQ

Facebook continues its shift towards a paid-first channel, with adoption from hospitality brands falling from 97% to 85%. More than half of brands (53%) now automate content from Instagram, reinforcing Facebook's position as a secondary organic posting channel. Paid activity dominates performance, driving 92% of views and 81% of interactions. Engagement rate has increased from 0.1% to 0.4%, although this rise is almost entirely fuelled by paid activity.

Across sub-sectors, pubs and bars remain the most committed, still treating Facebook as a core channel for their audiences. Restaurants tend to use it as a performance engine, prioritising reach and conversions over conversation. Nightclubs continue to see strong results from targeted paid event promotions. Larger estates focus on paid campaigns to reach audiences at scale, while smaller estates maintain a simpler presence with more occasional posting supported by selective boosts.

Looking ahead, Facebook Groups present a potential opportunity for brands aiming to build more meaningful community spaces, offering a route to encourage interaction outside the increasingly pay-to-play main feed.



# LinkedIn adoption has more than doubled.



**51%**

of brands have a LinkedIn company page versus just 21% last year



**47%**

encourage employees to post about the brand on their personal LinkedIn profiles (only 6% have formal requirements for them to do so)



**10%**

provide guidance or best practices for employees posting about the brand on LinkedIn



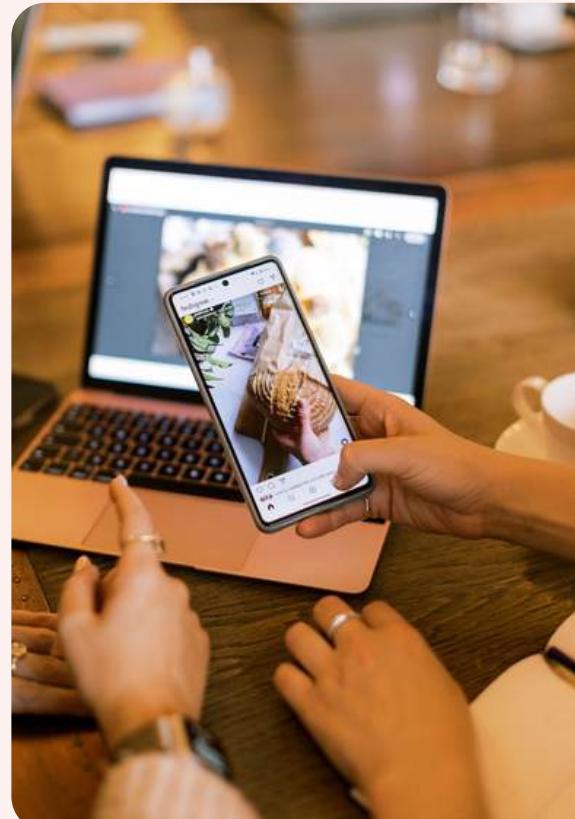
**83%**

say that 'Marketing' manages their company LinkedIn page (17% People/HR)



**80%**

of those who have a company LinkedIn page actively use it for recruitment



This year, we have delved deeper into how hospitality teams use LinkedIn, uncovering clearer patterns in structure, ownership and confidence across the sector. With recruitment pressures high, LinkedIn's role is becoming more defined. Recruitment remains the strongest use case, with two-thirds of brands using the platform to support hiring.

Adoption has risen rapidly, jumping from 21% to 51%. Yet activity is still mostly organic, with only 10% of brands running paid LinkedIn campaigns. This shows that many teams are still building confidence in how to use the platform strategically.

We are also seeing more intentional employer branding behaviour. Around a quarter of brands now encourage employees or senior leaders to post about the business on their personal profiles, and a similar number provide guidance to support this. Management varies, with most pages run by marketing teams while smaller estates often rely on people and HR.

Hospitality brands win when people understand the culture behind the scenes. LinkedIn is your chance to show what makes your team exceptional.

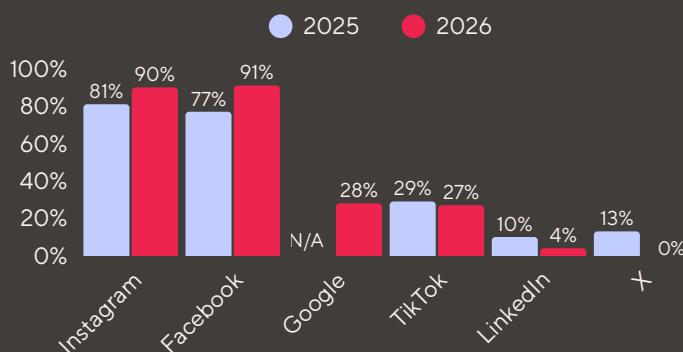
# Meta continues to dominate paid activity.



Paid activity on Meta continues to grow. Instagram's paid strategy usage has risen from 81% in the last year to 90%, while Facebook has increased from 77% to 91%, with TikTok remaining fairly flat.

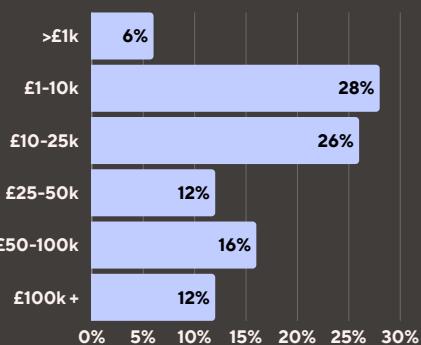
## % who have a paid ads strategy

(of those who use the platform):



## Total paid ads budget in the last 12 months

(NB. these figures are based on feedback from 51 brands, all of which do paid ads, know their budget and were willing to share)



## Top 3 KPIs used for evaluating PAID performance on social:

1. Click-through rate (CTR)
2. Cost-per-click (CPC)
3. Conversion rate

% who don't actively evaluate paid performance = 3%

## A growing skills gap behind paid performance

Many teams run day-to-day campaigns confidently, but fewer have the strategic capability or data foundations to connect paid activity to commercial results. Only 56% of brands can track bookings or conversions directly from paid ads, and 41% are still not using customer data to shape audiences. This limits their ability to target accurately, optimise spend and measure paid social advertising's impact in a meaningful way.

This is creating a widening gap between rising investment and the ability to measure its effectiveness. Strengthening data, targeting and measurement foundations is becoming essential, and expert guidance will help teams refine their approach and get more value from the budgets they already invest.

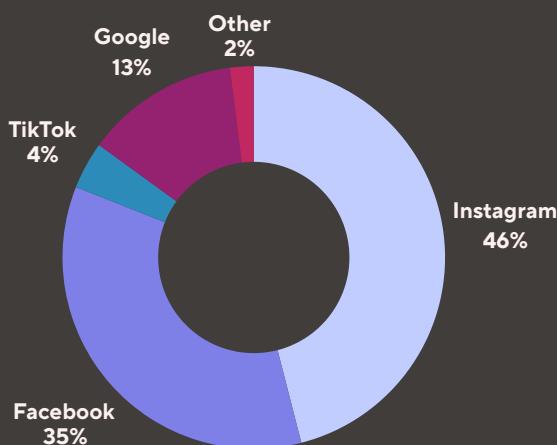


# How hospitality brands are spending their money.

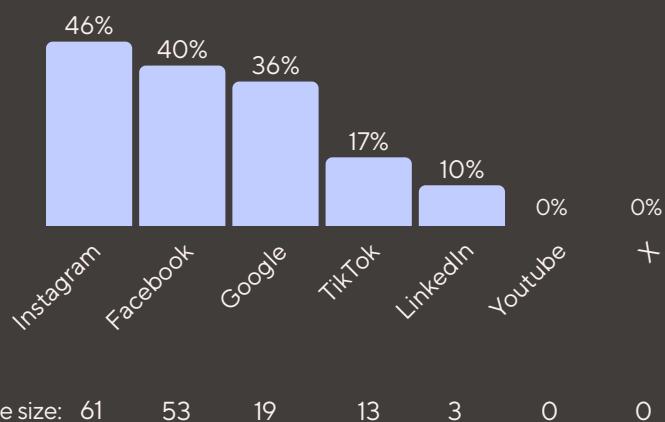


## Average distribution of paid ads budget across all channels:

(based on a sample of 61 brands)



## Average distribution of paid ads budget for those who use the channel:



Sample size: 61 53 19 13 3 0 0

Overall distribution includes every brand, even if they do not use the platform, which is why TikTok appears low at 4%.

Platform-specific distribution looks only at brands who advertise on that channel. For TikTok advertisers, spend jumps to 17%, showing meaningful commitment among those active on the platform.

## How different sub-sectors use paid

Café and Coffee Shop brands are the strongest at tracking conversions, with 78% able to measure outcomes effectively. QSR continues to push more budget into Meta to achieve fast, measurable returns. Unsurprisingly, enterprise estates are spending most on paid activity with 1-in-4 operating in the £100k+ range, while small estates keep budgets modest and focus more on reach than conversions.



# The three key stages of social media: As simple as A-B-C



by James Mobbs

I have always found that breaking things down into clear, defined and easy to understand stages really helps when trying to explain something that is actually quite complex, like social media. It also helps to liken it to something your wider audience or team might understand if needed. So here is my simple breakdown of social, compared to building a new menu.



## Awareness (stage 1)

The aim with social here is simple. Reach the right people to build the top of the funnel through views, impressions and reach. If more people know about your brand then hopefully more people will visit you. This is the highly visible side of social, generally creating and posting content almost every day.

It takes time. It's constant. It involves testing...and that testing is in public. Your team try new content styles, timings, hooks and formats and they see early signs of performance within minutes. Some things land, some fall flat and every now and then something takes off, but you never really know until it's out there.

In menu terms this is early development. Chefs play with flavours, proteins and techniques - but they do it behind closed doors. Imagine if every menu idea went in front of paying guests. It would be chaos. Constant testing and development is necessary for both, but in social this testing is in full view.

## Behaviour (stage 2)

Once you have awareness you need to influence behaviour. Being seen is pointless if it never leads to an action or feeling. This is where comments, likes, shares, saves and messages come in. It's also where community management matters.

Often the person handling your social is the first person a guest speaks to when they need help. A quick reply late on a Saturday night can build real emotional loyalty, but no response can cost you both now and further down the line. This is hard to track but hugely powerful.

Menu-wise this is about relationships and prep. The Exec Chef works with suppliers, trains teams and sets the kitchen up to deliver. It's everything behind the scenes that makes the dishes possible - lots of little tweaks all the time that add up.

## Conversions (stage 3)

This is the commercial end of social. Paid campaigns, bookings and revenue. You're spending real money, testing audiences and creative and aiming to understand cost per booking and return on ad spend. Attribution can get blurry but the core job stays the same.

Paid social also follows A-B-C. You need awareness at the top to influence behaviour in the middle and drive conversion at the bottom. You can't tell cold audiences to book straight away as they don't know you yet.

This mirrors execution in the kitchen. Hitting spec, plating consistently and collecting feedback to make small gains. The 'holy shit' moment when the plate lands, the guest loves it and raves about it to their friends. A lot of hard work goes into reaching this point.

**In summary**, treat each stage of the process differently whilst understanding they are linked. Social is far more than posting photos, like building a menu is more than putting food on a plate. Not every post will work. Not every new dish is a hit. Both take time, practice, dedication and a clear strategy.

James specialises in revenue optimisation for hospitality businesses and is the founder of RevOps Hospitality, working as a strategic consultant and fractional leader for both operators and tech providers.

# UGC-style content is now the dominant creative approach.



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



User-generated content (UGC) is by far the most popular style of content for hospitality brands, whether via customers or employees. Employee-generated content (EGC) was highlighted as a rising trend in last year's report, and nearly 1-in-2 hospitality brands are now using EGC in 2026 - we expect this to continue to grow.

Professional content also remains a key part of the mix. Professional photography is used by 85% of brands, and professional videography sits at 60% but usage of both, among hospitality brands, has dropped significantly versus last year.

Across sub-sectors, restaurants and QSR lean into UGC for its speed and authenticity. Pubs and bars still favour more traditional formats, while enterprise brands combine UGC with polished creative to maintain consistency across larger estates. Smaller estates rely more on UGC because it is quicker to produce and easier to resource.

UGC does not mean unpolished. It means real. Brands need to show up authentically while maintaining the identity that makes them recognisable, supported by regular content shoots that reflect the seasons and bring the customer experience to life.

21%

of total of hospitality brands social media budget is spent on 'content creation' (on average)



# Case Study: Driving organic social



## THE REAL GREEK EAT TOGETHER

Over six months, **The Real Greek** invested in elevating its social presence with content that feels vibrant, authentic and true to the brand's spirit.

That commitment has delivered clear results with the follower base **growing by more than 36%** across all platforms, driven by engaging moments that invite the community to connect with the brand.

### THE IMPACT OF CULTURALLY RICH, PERSONALITY-LED CONTENT:

- STRENGTHENING LOYALTY**
- GROWING COMMUNITY**
- SPARKING CONVERSATION**

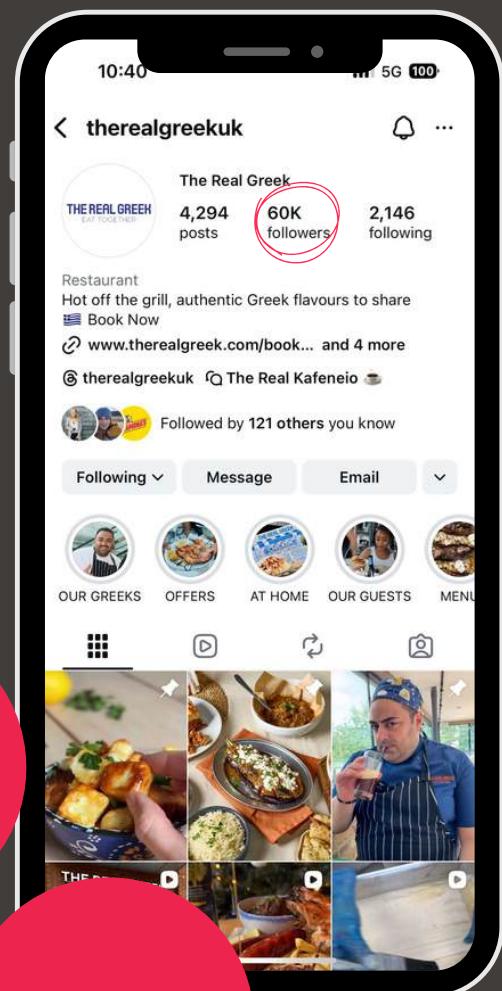


**+36%  
Followers**

**4.4M views**

A standout example is the viral Tzatziki recipe video featuring Chef Vaios. Shared on The Real Greek's own channels, it resonated far beyond the existing audience and achieved **4.4 million organic views** across platforms.

It highlights the impact of culturally rich, personality-led content in sparking conversation, strengthening loyalty and welcoming new people into the community. With thanks to Tess O'Bamber for the case study.



# AI is widely used for copy but limited in other areas.



## % of hospitality brands who are currently using AI for the following:



AI is now firmly part of everyday social work, with 76% of brands using it to support copywriting. Usage drops noticeably beyond this area, with only 27% using AI for imagery, 18% for ad optimisation and 14% for social listening. This shows that while AI is becoming routine for lighter tasks, its role in deeper creative and strategic activity is still developing.

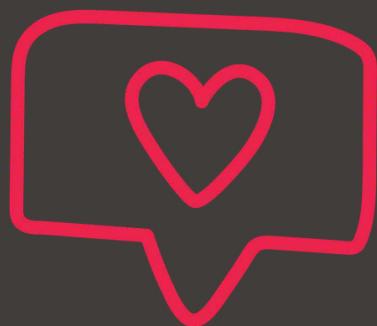
Across sub-sectors, QSR brands use AI more actively to support creative workflows and help shape community responses. Enterprise estates use AI at scale but tend to focus on consistency rather than creativity. Smaller estates value AI but use it in a more ad-hoc way.

## To use AI effectively, teams are focusing on three core principles:

 Lead with human insight, then use AI to refine. This keeps copy and creative on-brand and avoids anything that feels generic.

 Be clear on tone and intent. The stronger the brief, the stronger the output, especially for copy and community responses.

 Use real audience insight. AI performs best when paired with data that reflects true customer behaviour and preferences.



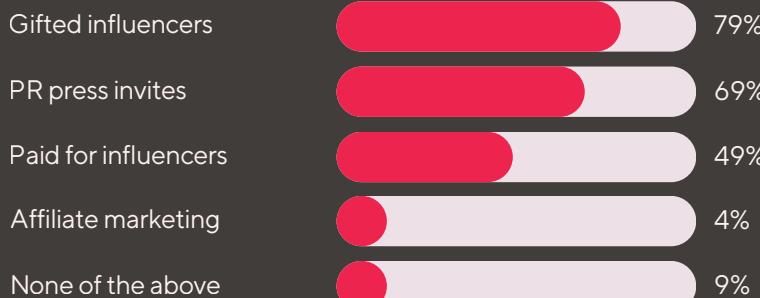
# Influencer marketing continues to accelerate.



Influencer activity is gaining pace across the hospitality sector. Paid influencer work has risen from 37% to 49%, and reactive influencer opportunities have grown from 27% to 49%. PR invites are increasing too, rising from 60% to 69%. Together, these shifts show that brands are relying more on creators to spark relevance, tell their story and reach new audiences.

As investment grows, many brands are moving away from one-off gifting and towards more meaningful creator relationships. Long-term ambassadors build deeper trust, deliver stronger storytelling and feel more aligned with the brand experience. Influencers should feel like part of your world, a long-term relationship, not a one-night stand.

## Do brand strategies include the following influencer marketing?



## The opportunity for AI influencers in hospitality

AI influencers are also gaining attention. These are digitally created personalities designed to behave like real creators, with their own look, voice and content style. They attract interest because they offer full control, consistent output and quick production.

For hospitality, the opportunity sits in storytelling rather than replacement. AI influencers could help brands showcase menus, experiences or new openings in imaginative ways that are difficult to produce at scale. But they work best as an addition, not a substitute for real communities and genuine customer connection. Authenticity still matters most, and any AI-led approach needs to complement, not compete with, the human side of hospitality.

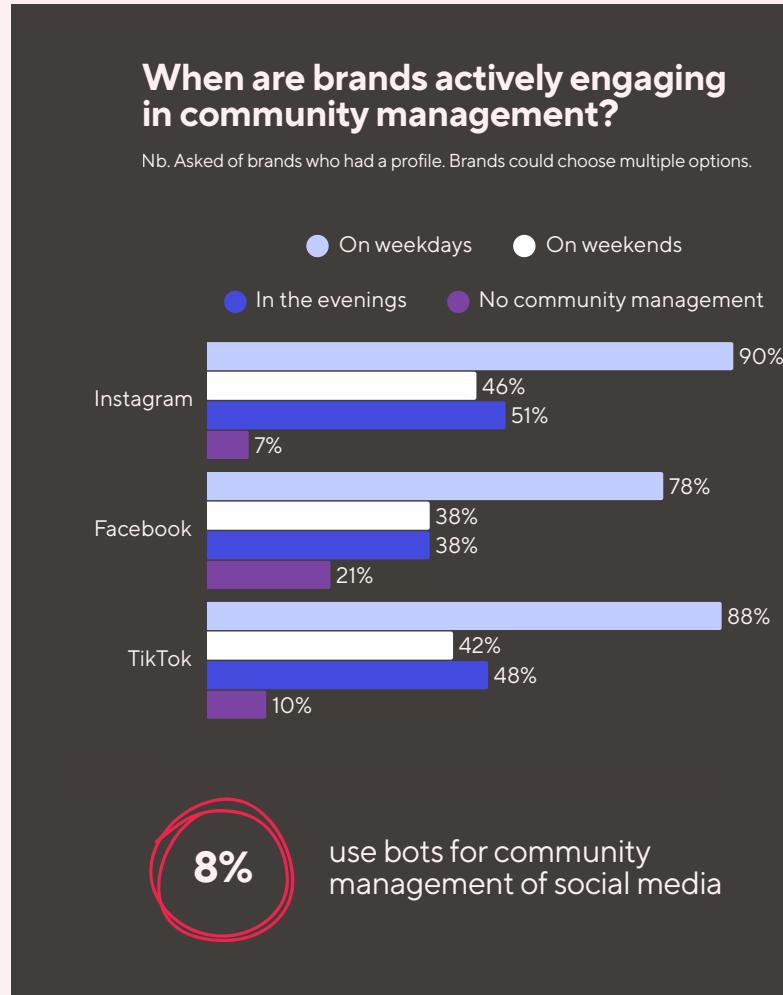
# The industry's biggest gap: weekend and evening community management.



Community management remains one of the toughest areas for brands to resource. Weekday engagement sits high at 78% to 90%, but coverage drops sharply when it matters most. Weekend engagement falls to 38% to 51%, and evening engagement sits between 38% and 51%. For an industry built around evenings, weekends and real-world guest moments, this shows a clear disconnect.

Nightclubs and QSRs provide the strongest weekend and evening cover, closely aligned with when their audiences are most active. Both larger estates, who juggle multiple sites and smaller estates, who lack capacity outside core hours, struggle to maintain consistent cover.

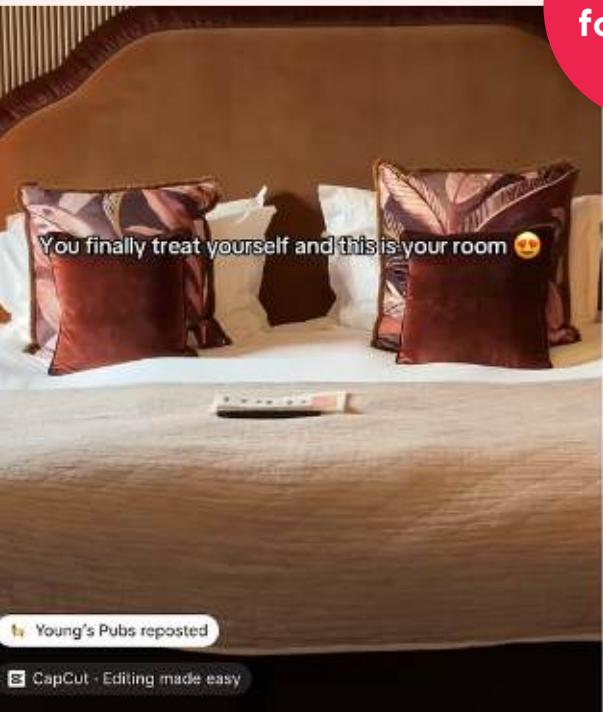
The principle is simple. Social never sleeps, and neither do your guests. Brands that show up in real time build loyalty faster than brands that only post. A practical solution is to bring in external support for seven-day, around-the-clock community management. The repetitive nature of the work can leave internal teams stretched and disengaged, so outsourcing helps protect their focus and wellbeing while ensuring guests receive full support.



# Case Study: Responsive community management



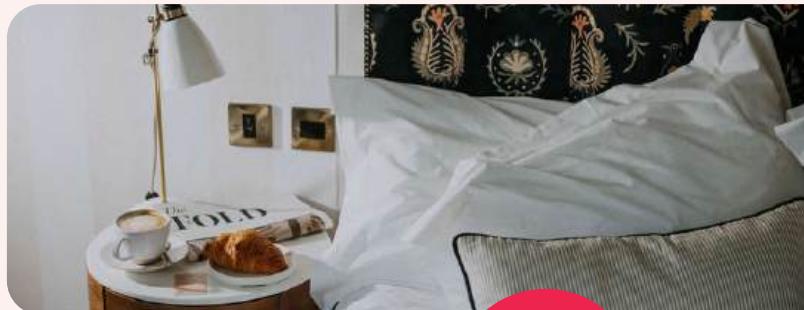
172 new followers



Stepping out from the central Young's Pubs account, **Young's Rooms** established its own dedicated social channels to speak directly to guests looking for inspiring places to stay.



This move created space for a more personal, experience-led community to grow.



Targeting audiences aged 30+ near Young's Rooms venues, this **multi-platform approach** aimed to grow awareness and engagement to directly drive bookings. Content showcases various room locations and stay types, from corporate retreats to romantic and dog-friendly getaways, through **strategic storytelling** and social SEO.

With consistent, responsive community management in place, every comment and message became an opportunity to guide, support and welcome guests into the brand world. Close coordination with the operations team turned guest moments into meaningful interactions.



From June 2025 to October 2025, Instagram performance surged with a **28% follower lift** and an **848% rise in shares**, while the new **TikTok channel built early traction** with more than 2,071 followers and over **815,512 views**.

Creating standalone channels allowed Young's Rooms to nurture a community that now champions the experience, not just the accommodation.

71.7k views

+848% shares

+28% followers

# Current challenges



What's currently frustrating social teams....

## Lack of time, capacity and dedicated resource

**1.** This is by far the most dominant challenge in the dataset: brands repeatedly describe being “one-person bands”, stretched across multiple accounts, or lacking an in-house content creator. For many, social is squeezed between competing priorities, leaving little time for ideation, filming, editing, and community management. The resource issue becomes even more acute when brands have multiple brand identities to maintain. Without adequate staffing, social becomes reactive rather than strategic. As a result, brands report missing key opportunities and battling with burnout.

## Consistent quality content creation

**2.** The sheer volume of content required across platforms, and the pressure to feed algorithms with fresh material is a challenge to most brands. Many express difficulty producing consistently high-performing videos or coming up with new ideas that feel on-brand. Keeping content “engaging and fresh” while juggling weekly rotas, filming constraints, and limited creative bandwidth is a recurring pain point. Several brands mention that what worked once often flops when repeated, adding to frustrations. This challenge is amplified for brands that rely on staff participation, where rota pressures and confidence barriers limit who can appear on camera.

## Cutting through the noise and standing out

**3.** Many brands mentioned how crowded the landscape has become - “every brand looks the same now”. Brands find it increasingly difficult to differentiate while staying true to their identity, especially when trending formats dominate feeds. The tension between trend-driven content (which gains reach) and authentic brand storytelling (which builds connection) is a major strategic dilemma. Several also highlight the challenge of creating personality-led content that feels unique without feeling forced. Ultimately, breaking through the constant scroll while preserving brand integrity has become a complex balancing act.

## Slow or inconsistent growth

**4.** Slow organic growth, follower loss, inconsistent reach, and unexplained fluctuations in engagement are a frustration for many brands. TikTok in particular is noted as “not yet in a growth phase” or difficult to unlock. The algorithm’s preference for fast, reactive content disadvantages brands that rely on storytelling or slower production cycles. Several mention “bot unfollows”, challenges reaching local audiences and an increasing difficulty converting posts into visits or bookings. This highlights a broader sentiment: organic social feels less predictable and the effort-to-return ratio has worsened.

## Absence of platform-led strategy & performance insight

**5.** Lack of platform-specific strategies, clear tracking methods, or mechanisms for measuring conversion were evident for many brands. Many struggle with understanding which audiences they are actually reaching, and whether social activity is translating into bookings. Some note that strategies aren’t tailored per channel, resulting in content that underperforms simply because it isn’t optimised for the format or audience behaviour. Others mention challenges with tracking, attribution and proving ROI. As social media becomes more central to the marketing mix, these gaps risk holding brands back from unlocking its full commercial impact.



# What does the future hold?



Focus areas for social teams in hospitality for the year ahead...

## 1. TikTok-first strategies and prioritising short-form video

TikTok dominates as the platform brands intend to invest in most heavily, accompanied by ambitions to increase video output and create more platform-specific content. This reflects a wider industry recognition that short-form video remains the most efficient driver of reach, discoverability, and cultural relevance. Many plan to “go all in” with bespoke TikTok strategies, shifting away from cross-posting and towards native storytelling, recipe content, behind-the-scenes formats and high-engagement video. There is also a strong push towards improving production values with greater polish, tighter storytelling and more brand-led creativity. Many hospitality brands see video not as a format add-on but as the backbone of their 2026 growth strategies.

## 2. Building deeper communities, authenticity and brand-led storytelling

A major theme is the desire to deepen community engagement, nurture repeat customers, and create meaningful two-way relationships. Brands want to shift from transactional content to storytelling that captures culture, people, heritage and experience – moving beyond “food shots” to richer narratives. Many note a desire to empower on-site teams, encourage employee or guest generated content, and bring more “real people” into the brand story. The goal is to build long-term loyalty by showing the heart and personality behind each venue or brand. This is a pivot from growth at any cost to growth built on authentic connection and emotional resonance.

## 3. Strengthening paid social, tracking & data-driven decision making

Many brands plan to invest more in paid social including TikTok ads, conversion ads, loyalty programme recruitment, brand campaigns and localised targeting. There is also a major push to improve measurement: upgrading reporting software, perfecting tracking and directly attributing social activity to bookings, ticket sales and footfall. This signals a shift towards more sophisticated performance marketing, where ROI is no longer anecdotal but evidenced. Brands increasingly recognise that robust attribution enables stronger business cases for budget and resource. The future strategy is based on creative excellence supported by clean, rigorous data.



# What does the future hold?



Focus areas for social teams in hospitality for the year ahead...



## 4. Leveraging influencers, creators, UGC & local advocacy

Influencers, content creators and customer-generated content will play a bigger role in plans for 2026. Rather than being a “nice-to-have”, these voices are now seen as powerful ways to build trust, reach new audiences and show the brand in a more genuine light. Several brands plan to improve how they find and work with influencers or to bring more structure to their creator activity. Others highlight the growing importance of involving on-site teams, stand-out staff members and loyal regulars in their content. Overall, there’s a clear move towards real people and real moments- the kind of content that feels authentic, relatable and far more persuasive than traditional brand posts.

## 5. Resourcing up: hiring specialists, expanding teams & incorporating AI

Many brands acknowledge that to achieve their ambitions, they need more hands. Alongside human resource increases, there’s notable interest in AI for content creation, customer responses, analytics or workflow automation used carefully so it enhances rather than replaces brand authenticity. Capacity is being seen not as a constraint but as an investment opportunity: more people and better tools mean better output and better results. Several brands explicitly link resourcing to strategic needs, such as tripling video output or expanding influencer programmes. This signals a professionalisation of social within hospitality: it is becoming a discipline that requires specialist talent and dedicated operational infrastructure.

### FOCUS ON: Navigating HFSS compliance on social

HFSS rules are reshaping how hospitality brands show up on social. The shift is away from indulgent product shots and towards storytelling rooted in people, atmosphere and the experience around food. Creativity is not restricted. It simply encourages brands to express who they are without relying on the most tempting menu moments.



**Content** should focus on heritage, craft, team culture, community and value. Brands need to avoid exaggerated food visuals, indulgent language and anything that could appeal to under-16s. The direction is simple. Lead with moments and experience, not HFSS-forward items.



**Influencers** work best when positioned as storytellers. Compliant creator content leans into ambience, team interactions and guest moments instead of highlighting HFSS dishes. This keeps activity authentic, warm and safely within HFSS boundaries.



**Paid social** can still deliver strong results when planned with care. Targeting should focus on adults, with ads centred on events, experiences and brand values rather than HFSS products. This protects compliance while keeping reach and visibility strong.

If you want deeper clarity on how to apply HFSS rules across your social strategy, drop Kitch a message at [hello@kitchsocial.com](mailto:hello@kitchsocial.com) and we can share our full guidance report.

# Looking ahead: A final thought.

**Channel expansion plans for 2026 focus on depth rather than breadth.** This year's data shows a clear shift.

Brands are moving away from chasing every new platform and focusing instead on depth, consistency and stronger performance on the channels that matter most. And planned additions for 2026 are modest with 21% of those who don't already use TikTok intending to start. The figure is the same for YouTube, and sits at an additional 10% for LinkedIn.

Nearly half of brands (47%) plan to add no new channels, with no expansion planned for Facebook, X, Substack or Reddit. Capacity remains the biggest barrier, and teams are prioritising what they can deliver well.

Looking ahead, discovery is evolving. Search will be shaped not only by Google but by AI-led platforms and new integrations. Some brands, like Lucky Saint, are already exploring Reddit to build visibility in environments such as ChatGPT. And Snap Map, the Snapchat and Tripadvisor partnership, also signals how search and social will continue to merge for hospitality.

The pressure on teams is real. Social is still handled by one or two people in many hospitality operators, with little capacity to broaden coverage or deepen channel expertise. Expectations rise, but performance stalls when workload outweighs resource. This year's State of Social data gives teams permission to challenge these unrealistic demands.

To grow with confidence, marketing teams need either to increase dedicated headcount for social or bring in external partners who can slot in seamlessly. This gives brands the capacity, creativity and consistency they cannot currently deliver.

## Want to chat in more detail?



### Benchmark your performance

Turn data into clear, actionable insights.

Understand how your current social strategy compares, and where to strengthen it for greater impact.



**Book a 1:1 with Natalie here**

# Preparing kids to get cooking



Prept twists the lid on cooking skills to inspire healthy relationships with food.



Our mission is to teach young people how to cook, preparing them with fundamental skills and food knowledge for life.

## Prept learning programme.

Our food education programme works with schools to supercharge the curriculum, providing immersive sessions in the classroom, on working farms, and other hospitality venues.

Prept's chef educators work with primary and secondary school students, serving up positive food experiences to inspire young people to live happier, healthier lives.

## Sponsoring schools.

Businesses sponsor schools to work with Prept. If you or your organisation would like to help with sponsorship, let us know.



Being taught how to cook is a skill that young people can use throughout their lives.

Steven Edwards

Prept Partner and Chef Owner at Etch

## Partnering with Prept.

We work with hospitality partners to raise awareness and funds for Prept. Foundation. Fancy becoming an official Prept Partner? Just reach out to us.



To visit our website or make a donation, scan the QR code.

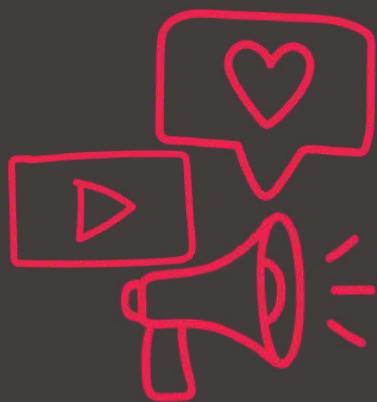
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# State of Social

THE BENCHMARK FOR HOSPITALITY SOCIAL METRICS

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