The Voice of Travelers

Leveraging User-Generated Content for Tourism Development | 2018

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Executive Summary

Tourism is growing faster than ever before in emerging and developing economies. In just 10 years, the tourism landscape has changed completely. Digital platforms are changing the way travel is traditionally researched, bought, sold, experienced and shared. Research by Google and Phocuswright suggests that nearly half of travelers are comfortable researching, booking and planning their trip using only a mobile device.[1] User-Generated Content (UGC) is fast becoming the most important and widely used source of travel information. This impacts the traveler's path to purchase and disrupts established travel agencies, guidebooks, conventional marketing approaches and star rating systems. It also presents new opportunities for developing destinations to leverage these platforms for big data and cost-effective performance improvements. Harnessing innovation for the benefit of the poor is one of the most important challenges currently facing development organizations.

This growth in review volume and activity on UGC platforms is being driven out of emerging markets. Over the past five years, the average growth rate of reviews posted by travelers from the Middle East, Asia, and Eastern Europe was 21 percent, 18 percent and 10 percent respectively.[2] There are 3.2 billion people who use social media; this is up 13 percent from last year and translates to 11 new people using social media every second. Central and Southern Asia are driving this growth.[3]

The growth of UGC is unprecedented. Managing online reputation is now central to running a thriving tourism business. For many, particularly those in low-income destinations, this is new and unknown territory. Some of key questions for development are: are these technologies accessible, are they leading to more inclusive outcomes, and what are the risks and how are we addressing them?

The World Bank Group and TripAdvisor collaborated on this report to support destination management organizations and local suppliers to extract the most value from UGC, while avoiding its pitfalls. This body of work aims to highlight good practices and suggest tools to consider when building plans for managing online reputation; it provides case studies that illuminate effective campaigns and investment. The report is intended for

use by those involved in or responsible for the management and/or marketing of a destination or a tourism business, with a focus on the leisure travel market. The market analysis is global; there is also a section dedicated to the Chinese market due its growth potential and different UGC platforms. The aim of the report is to guide businesses and public-sector bodies on how to use UGC to make their marketing budgets go further and to improve the competitiveness of their destinations.

The report explores how businesses and destinations can use UGC to reach potential consumers and drive business and explores the future applications of UGC to monitor business and destination health, improve service levels, and boost overall business performance. It also looks at how UGC can help reduce the barriers for low-income destinations to compete in a global arena and create inclusive business opportunities.

The Voice of Travelers explores how UGC could lead to more inclusive outcomes for tourism at a global level. The report is designed as a primer on UGC, not as a comprehensive manual. It is designed to start a dialogue on leveraging UGC for inclusive and sustainable tourism development and to identify areas for future work.

The report identifies 10 reasons destinations and tourism businesses need to better understand the UGC landscape in order to leverage UGC to achieve stronger development outcomes:

1: Drive Revenue

Marketing campaigns incorporating UGC have been shown to drive higher market efficiencies and bookings. For example, in 2017 TripAdvisor bookings alone made up US$546 billion of global tourism spend and US$80 billion additional spend, according to a study by tourism research firm Tourism Economics. The study also found that an increase in TripAdvisor reviews is followed by higher tourism demand.[4]

2: Increase Access to Market

UGC platforms like TripAdvisor, Facebook, Google, Instagram and Twitter offer destinations and businesses an online presence and a direct connection with travel consumers through business accounts.

3: Leverage Consumer Content

Destinations and businesses can use the content created by consumers to market their own businesses. People trust their peers 12 times more than they trust brands, which is why brands use UGC in their campaigns.[5]

4: Build Competence

Effectively managing platforms and content takes time, money, and specialized skills including writing, digital marketing, and public relations. Destinations often need to acquire different software platforms to manage content; there are legal implications of UGC use that must be carefully considered.

5: Monitor Performance

UGC can provide new and real-time data on consumer behavior, allowing destinations and businesses to improve their performance. Organizations can audit user-generated content to see what kinds of experiences travelers are interested in and what they post about.

6: Improve Quality

Feedback from customers allows businesses to improve their product offerings. Social platforms provide a forum for customers to provide feedback and raise issues without the social pressure of voicing concerns in person.

7: Predict Performance

Research has shown that review ratings are one of the most important predictors of hotel performance.

8: Benchmark competitors

UGC and public social media sites offer destinations and businesses the opportunity to benchmark against competitors and aspirational targets. Destinations can see how their competitors perform in different product categories and what other destinations travelers are considering.

9: Influence Online Image and Exposure

UGC impacts the way a brand or business is perceived and contributes to what some researchers call Tourist Destination Image (TDI), the image that a traveler has of the destination that is a composite of news, branding, user reviews, and other influences.

10: Measure Marketing Return on Investment

User-generated content is updated in real-time and can often reveal new data about a destination more quickly and cost-effectively than surveys or other forms of data. Destinations are always challenged with measuring the ROI of their marketing and management efforts, especially since they are not the end-providers of the travel experience.

The report includes a selection of cases studies to illustrate how destinations are currently leveraging UGC. Each case study sheds light on potential applications, but also illustrates that the application of UGC for uses outside of marketing is still nascent.

Jordan

Tourism is critical to Jordan's economy, but the country struggles with perception issues due to regional instability. Jordan relies heavily on UGC for much of its marketing and leverages UGC to illustrate that the country is a safe and interesting tourism destination.

Bermuda

The Bermuda Tourism Authority was looking to strengthen its competitive position and develop new tourism products to compete with regional destinations. The country successfully used insights gleaned from UGC to develop new tourism products.

South Africa

South Africa Tourism sought to increase awareness of cultural tourism products in the U.S. market. The tourism office hired influencers to launch a UGC campaign to much success and generated engagement and new interest in travel to South Africa.

Ireland

Tourism Ireland was looking to increase visitation to rural Western Ireland through the development of a new tourism route. The Destination Marketing Organization (DMO) leveraged user reviews and ratings in a marketing campaign to launch the new travel experience.

Montreal

Tourisme Montréal was looking to build up its brand through new and relevant content to communicate the essence of the city. The DMO curated content from residents and travelers using the hashtag #MTLMoments, and used the content in an effective multichannel campaign to drive interest and visitation to the Canadian city.

Scotland

VisitScotland wanted to increase visitation from London millennials. To reach this audience, the DMO combined UGC and tour operators into a travel shopping experience that showcased real travel experiences.

Hamilton Island

Hamilton Island Australia desired to boost their visitor numbers. The team brought UGC to the forefront of their newly redesigned website and saw increases in effectiveness, website visits and social engagement.

Puerto Rico

The U.S. Island Territory of Puerto Rico was hit with a series of hurricanes, which greatly affected the residents and the local tourism industry. The Puerto Rico Tourism Company successfully used UGC to manage crisis communications and assess product quality on the ground following the hurricanes.

Indonesia

The WBG group is leveraging UGC to monitor performance as part of its work with the government of Indonesia to improve the competitiveness of the tourism sector. While the project is still in its initial stages, it shows the potential applications for UGC in development work.

The report underscores the fact that UGC, the 'Voice of Travelers', could be a vehicle to drive more inclusive, competitive and sustainable outcomes in tourism. Destinations no longer need to have multi-million dollar budgets to reach their markets. Smart management of inspirational content shared by visitors, and the use of influencer marketing and online communities, can do some of the heavy lifting. Traditional marketing messages are now much less effective than they used to be, particularly among millennials. More than half of all travelers consult online word-of-mouth (eWOM) before booking rather than guidebooks or tourist-board websites. UGC provides destinations with a source of content for marketing that resonates with other travelers, is economical to leverage, and goes directly to consumers.

The report finds that businesses also have a lot to gain from active UGC management. UGC significantly impacts the purchasing behavior of tourists. The report also notes that businesses do not need to feel powerless; responding to reviews, particularly responding to negative reviews positively, has a big impact on consumer choices. The report suggests ways to deepen the understanding of UGC and apply to future research, which was beyond the scope of this report:

1: Analyse qualitative visitor information

UGC provides new forms of data and ways to analyze qualitative visitor information. Deeper comparison of qualitative and quantitative data may yield insights that destinations have not had access to previously at scale. Semantic insights, that analyze intent rather than simple web queries, could help destination management by predicting new visitor trends. The case of Bermuda helps to illustrate this.

2: Repositioning or rebranding

UGC may help a destination reposition or rebrand itself following conflict or violence: travelers look for reassurance from other travelers about the safety of a destination, especially if it is located in a region where there is conflict. Jordan has effectively used UGC for this purpose.

3: World Bank Group's Women's Entrepreneurship Financing Initiative

UGC training may provide an opportunity to fast track access to market for tourism destinations and tourism SMEs, many of which are women-owned and managed. Work is currently underway through the Women's Entrepreneurship Financing Initiative to address this concern.

4: Crisis response management

UGC may have a role in crisis response management. UGC yields real-time data, which could assist national authorities act quickly in dealing with the wake of a crisis. The case of Puerto Rico highlights this opportunity. This would be delivered in tandem with more proactive content about how past crises have been mitigated.

5: Monitoring impact of investment

UGC may provide a reliable tool to monitor the impact of WBG investments. The collaboration between WBG and TripAdvisor may provide opportunities to track the "before, during, and after" of, for example, capacity-building or product development activities on businesses and destinations.

6: Managing visitor movement

UGC may help destinations better manage visitor numbers and movement. UGC reveals travelers' behavior in real-time. This holds significant potential both in terms of helping destinations to avoid the problems that come with overcrowding, as well as offering innovative ways to distribute the impact and benefits of tourism across a wider geographic and economic area.

This is the first WBG report on UGC and tourism, and it is just a starting point for the WBG's partnership with TripAdvisor. Next steps may include: the development of UGC diagnostics, training webinars and information sessions for operational staff, crisis-management tools, and exploration into the use of review data for investment impact assessments. As the case studies demonstrate, there is much to be learned from effective UGC management and how this innovation can promote greater inclusion.

The WBG is grateful for the partnership with TripAdvisor and looks forward to future opportunities to operationalize the results of this initial work for more inclusive and sustainable tourism.

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Definitions & Acronyms*

Application Programming Interface (API): allows two different applications to talk to each other directly. The API is the messenger that delivers the requested information from one digital platform to the other.[6] It is used to pull Instagram images, reviews, and other UGC off the digital platform and onto platforms like websites and screens.

Automated Rights Management (ARM): system that allows the destination manager to request a copyright from a content author. Usually delivered via the selected social media platform messaging tools, and containing a simple automated response system which generates an immediate waiver.

Click-through rate (CTR): the percentage of people visiting a web page who click on a link to a particular advertisement.

Completion Rate: number of times that a video plays to its completion.

Conversion pixels: a type of computer programming language that can be added to a web page to track actions that users are taking on website, including referrals from another web page.

Destination Management/Marketing Organization (DMO): the leading organization, which may encompass the various authorities, stakeholders, and professionals. It facilitates tourism sector partnerships formed to work towards a collective destination vision.

Digital influencer: an online person or personality with authority in a certain area or subject who exerts influence over their audience. They can create an effect, change opinions and behaviors, and drive measurable outcomes online.[7] Influencers typically have large audiences on various social media networks and work with brands to share their content or experiences for a set fee. Also called social media influencer, key opinion leader (KOL) or just influencer.

Digital platform: the combined software and hardware that allows participants to interact with each other virtually. Examples include websites, social media, and mobile applications.

Distribution channel: the link between the suppliers of travel services and the consumer. It is a system of distribution that makes the product available.

Domestic tourist: a visitor traveling within his/her country of residence whose trip includes an overnight stay outside of their usual area. If a trip does not include an overnight stay, he/she is classified as a same-day visitor or excursionist.

Earned media: a measure of online exposure that a brand does not directly pay for and that is not on their owned media channels. Earned media is usually made up of professional media coverage and online word of mouth (eWOM), usually seen in the form of mentions, shares, reposts, reviews, recommendations, or content picked up by third-party sites.[8] Earned media is an essential part of a digital media strategy and goes along with owned and paid media.

*The terms defined are done so in the context and purpose of this document. Definitions are not intended to be universal. Most definitions have been adapted from multiple sources and World Tourism Organization (UNWTO).

Electronic Word of Mouth (eWOM): made up of all communications for consumers facilitated through digital platforms related to the usage or characteristics of particular good, service, or its provider. This includes the communications between the business and the consumer, as well as communications between consumers. This transparency is key to giving eWOM its credibility.

Engagement: social media engagement measures the public shares, likes and comments for an online business' social media efforts. Measuring return on investment for social media marketing efforts is difficult; engagement is a blanket metric that doesn't describe how many users end up purchasing.

Experiential travel: a form of tourism during which people focus on experiencing a country, city, or particular place by connecting to its history, people, and culture.

FIT traveler: stands for Free Independent Traveler. This travel industry term refers to those travelers who research and book on their own trips without the assistance of a travel agent or group tour operator.

High-involvement purchase: a purchase that carries higher a risk to buyers if they fail, are complex, and/or have high price tags. In order to make a purchase decision, consumers engage in what is called extended problem solving: they spend a lot of time comparing different aspects such as the features of the products, prices, and warranties. Travel, a car, a house, and an insurance policy are examples.[9]

Impression: number of times a website is viewed. The number of impressions of a particular advertisement is determined by the number of times the particular page is located and loaded.

Inbound tourism: the activities of a non-resident visitor within the country of reference.

International tourist: an international traveler who, with respect to the country of reference, is (a) on a tourism trip and (b) is a non-resident traveling in the country of reference or a resident traveling outside of it. If a trip does not include an overnight stay, he/she is classified as a same-day visitor, or excursionist.

Meetings industry: meetings, incentives, conferences and exhibitions (MICE) is a type of tourism in which large groups, usually planned well in advance, are brought together for a particular purpose.

Net Promoter Score: an index ranging from -100 to 100 that measures the willingness of customer to recommend products or services to others. It is a proxy for gauging the customer's overall satisfaction with the company's product or service and the customer's loyalty to the brand.[10]

Outbound tourism: the activities of a resident visitor outside the country of reference.

Online Travel Agency (OTA): online companies that allow customers to book various travel-related services, such as transportation and accommodation. Examples include Booking.com, Expedia and Priceline.

Owned media: owned media is any web property or publication that the organization can control and on which it can publish content. Owned media channels connect organizations directly with their target audiences and can include websites, print magazines, blog sites, and social media channels of owned media properties.[11] Owned media channels often do not have built-in distribution; many organizations use paid media to increase the exposure of their owned media channels in order to drive awareness.

Paid media: an organization pays for online exposure to a given audience or media through paid media. Paid media can be an effective way to boost earned and owned media.

Search Engine Optimization (SEO): the process of analyzing web searches not just based on the words used or answering a simple query but by the intent of the words.

Social media: websites and applications that enable users to create and share content or to participate in social networking. See Web 2.0.

Sustainable tourism: tourism that takes full account of its current and future economic, social, and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.

Supply Chain: a tourism supply chain (TSC) is defined as a network of tourism organizations engaged in different activities ranging from the supply of different components of tourism products/services, such as flights and accommodation to the distribution and marketing of the final tourism product at a specific tourism destination.

Tourism: a social, cultural, and economic phenomenon, which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes for more than 24 hours and less than one year.

Tourism expenditure: the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.

Tourism product: a combination of tangible and intangible elements that make up a tourism experience, such as natural, cultural, and manmade resources, attractions, facilities, services, and activities around a specific center of interest, which represents the core of the destination-marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a lifecycle.

Tourism segment: a way of describing components of visitor demand in accordance with common attributes, such as origin, sociodemographic characteristics, and motivations for travel. Segments are often matched with a range of travel services, i.e., transportation, accommodation, activities/services/products consumed while on travel.

Tourist: a visitor (domestic, inbound, or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay.

Tourist Destination Image: the composite of image a tourist has of a given destination based on perceptions, media consumption, word of mouth, experiences, and other sources.

Trip: travel by a person from the time of departure from his/her usual residence until he/she returns (round trip). Trips taken by visitors are tourism trips.

User-generated content (UGC): information created and shared by individuals through Web 2.0 applications. UGC includes any text or visual piece of content created by an individual user that they share with their networks, publicly and/or privately. This not only includes all social media content, but can also includes product reviews, videos, personal blogs and any other type of online comment created by consumers.

Visitor: a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure, or other personal purpose) other than to be employed by a resident entity in the country or place visited. Also referred to as traveler throughout the text.

Web 2.0: a term coined in the second phase of world wide web development that represented major paradigm shifts in technology. These shifts created platforms like Wikipedia, Facebook, Twitter, YouTube and myriad blogs, which allowed for the creation of user-generated content (UGC) and enables everyone to have their say on anything and publish it to the world at large. *See UGC.*

Word of Mouth (WOM): oral or written communication about a product or service by a past customer to a prospective customer. *See eWOM.*

Introduction

Social media and the social web have fundamentally changed the way companies do business and the way people connect with each other. Often referred to as Web 2.0, social media has created an entirely new way for individuals, organizations, and companies to interact. Social media platforms enable users to post content publicly and privately, creating virtual communities. The ability to interact with other consumers and create content without a media outlet has shifted the power dynamic between the business and the consumer, democratizing digital media.[12] This shift in power has affected many industries and has significantly impacted the way tourism businesses and destinations operate and attract customers. The shift can also provide innovative ways for low-income countries and destinations to become more sustainable, inclusive and competitive.

Prior to the advent of online booking and the social web, destinations and travel businesses reached consumers through offline channels, such as a storefront or brochure, or through media outlets like magazines and TV channels. Destinations and businesses were more in control of the conversation with their consumers. Third-party destination coverage and business reviews were limited to the trained media and hospitality professionals who awarded star ratings, wrote travel features, and stamped seals of approval. Tourist boards spent millions on the development of standards, rating systems, and the implementation of inspections. Travelers then shared their travel experiences with their friends and family through conversations, photo albums and slideshows.[13]

Today platforms like TripAdvisor, Instagram, Twitter and Facebook have given travelers the opportunity to share their pictures, videos, recommendations, opinions, and reviews of their travel experiences, virtually and in real-time with their friends, as well as with large global audiences. In 2017, Instagram reported more than 95 million photos and videos were published on their platform every single day,[14] and these were "liked" 4.2 billion times a day by other users.[15] These platforms have resulted in an entirely new kind of travel information: user-generated content (UGC), which is often more widely used and influential than other sources of content.[16] A study in the journal *Tourism Management* found that "UGC is perceived as more trustworthy when compared to content from official destination websites, travel agents, and mass media." The study revealed that consumer trust of travel UGC is driven by consumers being able to get a feel for the destination prior to traveling. The trustworthiness and influence of UGC is not a given and is determined by many factors including the relevance, quality and usefulness of the information, as well as users' past experiences with the online platform.[17]

Users creating their own travel content is now the norm and go-to source of travel information. Online travel reviews on TripAdvisor have grown to 660 million in 2018 with more than 255 new contributions posted every minute.[18] This trend is apparent on other platforms. In January 2015 OTA Booking.com had 43 million verified reviews,

which grew to 123 million in July 2017.[19] UGC has changed the way destinations and businesses reach their consumers, and the way those consumers make travel decisions. A study by OTA Expedia and comScore, a digital consumer behavior research firm, found that in 2016, U.S. travelers alone spent 8.7 billion minutes consuming digital travel content, a 41 percent increase year-on-year.[20]

UGC is now mainstream and it is an increasing part of tourism marketing strategies. Uploading content has become second nature for travelers. There are many factors and trends that have led to the rise of UGC as an invaluable travel research and brand marketing tool. Here are the most influential:

1: Increased smartphone use

Nearly 2.4 billion people were projected to use a smartphone in 2017, a 10.8 percent increase.[21] Over 32 percent of the global population used a smartphone in 2017.[22] Mobile phone adoption has greatly increased the amount and types of user-generated content. Travelers now have a sophisticated device to shoot travel photos and videos, edit them, and upload them within seconds, resulting in high-quality, experiential content available for brand use. However, mobile phones capable of accessing the internet is not equally distributed around the world: 97 percent of people living in developed countries have access to an active mobile-broadband subscription compared to 84 percent in developing countries.[23]

2: Rise in social media channels

Many social media channels have launched in the past decade including Instagram, Pinterest, SinaWeibo, and Snapchat. These platforms have rolled out travel-friendly features such as location tags and filters allowing users to include the name and geocoordinates of where they are traveling and the businesses they are frequenting. Travelers have more options for sharing and viewing travel content than ever before. In parallel, many travel websites and booking channels have added the ability for users to rate their experiences and post reviews — increasing the prominence of UGC across the internet.

3: Consumers are wary of brand content

Many reports indicate the decline in consumer brand trust is a driver for more consumers to use UGC as a source of information.[24] Havas Group's 2017 "Meaningful Brands" report found that 60 percent of content produced by brands was declared to be poor, irrelevant, or failed to deliver.[25]

4: Content creation and publishing is easier

Content is even easier to create than it used to be. You can publish on multiple platforms with one click. Single sign-on has allowed users to log into many platforms with one set of usernames and passwords, allowing them to share content across the web. UGC platforms have developed intuitive mobile apps which make it easier for travelers to upload content with location tags and other useful information while they travel.

5: It's part of a new interactive tourism experience

Platforms and businesses prompt travelers to share their travel experiences. Facebook asks you to post a review after checking into somewhere. Hotels and restaurants ask you to write a review following your visit. An increasing number of travelers take pride in providing reviews and consider it part of the travel experience.

6: The growth of experiential and transformative travel

Travelers are charting their own course to new and low-income travel destinations in search of connections with local culture and personal transformation.[26] These off-beat journeys require more research and thus travelers turn to UGC for authentic perspectives of travel. *Afar Magazine* cites technology and UGC as a major driver of this shift. Travelers see the posts from other travelers and can see the location of the post and how the traveler experienced it so that they can replicate the experience themselves.[27]

7: Millennials are leading the UGC trend

This generation is more influenced by their peers' social feeds than other age groups. "Millennials are very influenced and very motivated by their social networks, more than any other generation," Peter Cassidy, Founder, Chief Product Officer at software provider Stackla, said in an interview with Travel industry media company *Skift*. "They are creating more brand-related content faster than other generations. It's a perfect storm of creating content and trusting the content."[28] This glut of UGC content can be leveraged by brands in their social and other marketing channels.

8: Growth of visual content and the ability to showcase it

Travel is highly visual and social travel platforms have launched many features to better showcase visual content. Social media first started out as text posts. Today you can post a photo, video, a 360 video, a gif, a fast-moving video of your trip, and you can stream a live video where people can watch your experience in real-time. Many destinations have dabbled in virtual reality to bring consumers closer to the travel experience from home. Travel media outlet *Tnooz* says that virtual reality will soon become mainstream.[29]

9: Increase in UGC quality

Traveler content is becoming higher quality, even close to professional quality. "The line between user-generated content and professional has completely blurred." Susan Wojcicki, Chief Executive Officer, YouTube, USA, said in an interview. [30] Consequently, UGC is starting to make its way into mainstream media channels, for example, Apple's "Shot with an iPhone" campaign which takes content shot by iPhone users and puts it on billboards and uses it in print ads.

10: Real-time information

Consumers are looking for reliable, real-time content. This has contributed to the decline of print travel media, which has a shelf life. Destinations and their products are constantly evolving and print publications struggle to keep pace with this change. Smartphones allow consumers to be more spontaneous. According to Think with Google, 85 percent of leisure travelers decide on activities only after having arrived at the destination.[31]

The democratization of media has lowered the costs and technical barriers to entry into digital marketing. This provides new opportunities for low-income countries and SMEs to develop a web presence, utilize new sources of data, and connect directly with travel consumers.

The traditional intermediator has become relatively obsolete. Media companies are struggling to keep pace with the change in social media. *Skift* cites that many traditional media companies didn't adapt quickly enough to online media models and consumers we able to find many free resources for content.[32] A survey by Ipsos MORI and TripAdvisor found that only 19 percent of travelers use travel guide websites and 6 percent use the media when travel planning.[33]

Many destinations and businesses are already taking advantage of this content, but the landscape is constantly evolving and can be challenging to navigate. It is difficult for tourism managers in the public and private sectors to know where to start, how to find the appropriate means to encourage, aggregate and promote UGC, and how to spend resources efficiently and effectively. If they are to remain competitive, destinations and enterprises need to better understand the benefits and risks of UGC, and how to best take advantage of this content and the platforms it is published on.

In light of these trends and the ubiquity of UGC, the World Bank Group has partnered with TripAdvisor to explore harnessing the potential of UGC for inclusive and sustainable tourism development in competitive destinations. The following report offers good practices, tools and case studies on user-generated content. While there is still a lot to be explored, UGC has the potential to be a powerful resource for low-income tourism destinations.

UGC: Platforms & the Big Picture

Destinations and tourism businesses are tasked with reaching new travelers every day, because unlike other industries, travel has fewer repeat clients. Reaching new travelers has become increasingly difficult due to the sheer quantity of information consumers are faced with and the increasing number of travel destinations. *Skift* reported on this trend in its *The Megatrends Defining Travel in 2018* stating, "With more competition in the travel space, destinations need more interesting and nuanced content to reach travelers. This goes beyond pretty pictures."[34]

There are also more people traveling than ever before: in 2017, international arrivals grew to 1.3 billion, up 7 percent from 2016 and marking seven years of sustained tourism growth.[35]

International tourism spending grew to US$1.4 trillion in 2017 — and is likely to continue to rise as the number of households able to afford international travel grows.[36] While the North American and Western European tourism economies have each grown by over 15 percent and 9 percent respectively in the past 10 years, the Asian market has increased by more than 130 percent, due in part to the newly expanding middle class in the region.[37] This growth has changed the profile of the typical traveler and puts destinations in the position of trying to attract increasingly diverse travelers with different needs, UGC platforms, and travel styles.

Dan Christian

Chief Digital Officer of travel conglomerate Travel Corporation's (TTC) [38]

"User-generated content could not be more important in the travel industry. Everywhere you look, it's having a significant impact on decision making."

Figure 1: Sources of Travel Information

Source: TripAdvisor, 2016 [39]

CQ12: Which of the following sources of information, if any, did you use to plan your most recent trip?
Base: All responders (36,444); Age groups: 18 – 34 (7,173), 35 – 54 (16,540), 55+ (12,731).

	Global	18 – 34	35 – 54	55+
word of mouth	38%	44%	35%	27%
content posted by travelers	35%	38%	35%	27%
content posted by friends + family	22%	27%	19%	12%
content posted by businesses	13%	14%	13%	9%

18 – 24	24 – 34	35 – 49	50 – 64	65+
28%	33%	32%	34%	36%

Use of guidebooks
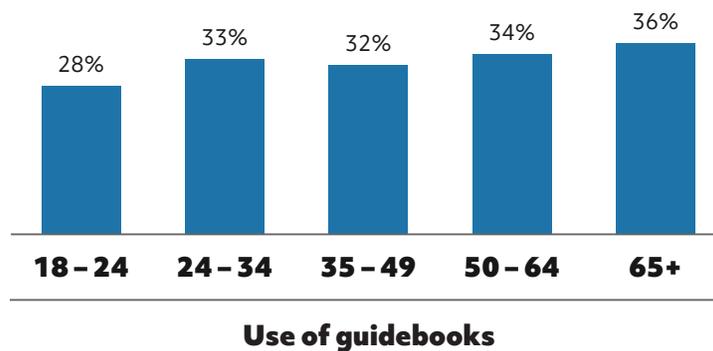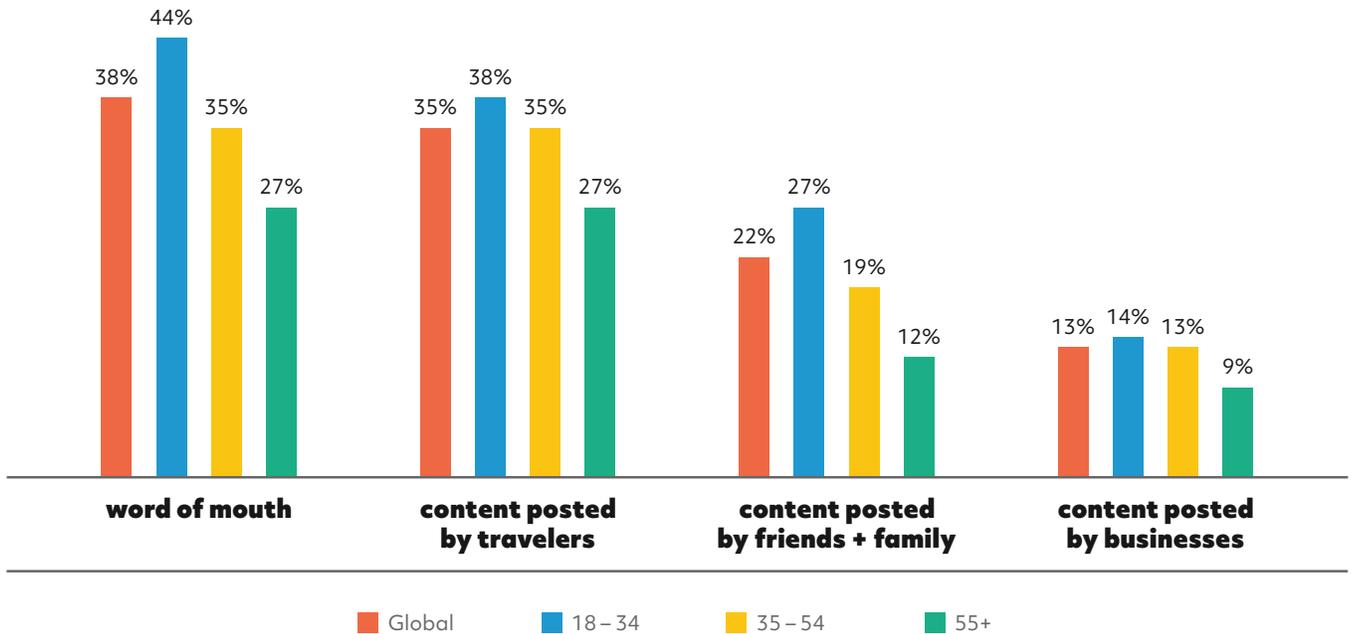
The Power of Word of Mouth (WOM) & e-WOM

Word-of-Mouth marketing has long had a strong influence on the consumer decision-making process. It is even more important in a high-involvement purchase like travel, which has great financial and emotional importance and which can pose risks if mistakes are made. Consumers perceive WOM as more credible than a company's marketing materials, because the content is not being distorted by company/organization interests.[40] According to a survey of more than 30,000 EU travelers, UGC was used by up to 35 percent of respondents. Only 17 percent of respondents used information offered by a service provider or destination.[41] Despite this, destinations continue to pour millions of marketing dollars into their websites, magazines and other official marketing channels.

Technology has enabled WOM to be published online and has enabled consumers to share their opinions beyond their social circles to the online communities created by platforms like TripAdvisor, Facebook, Instagram, and Google. OTAs have followed suit by allowing consumers to rate and write reviews for hotel properties, making this UGC hyper relevant to the end user. This phenomenon has given rise to what is called eWOM.[42] Today digital platforms are driving this trend by giving consumers a free platform on which travelers are able to share opinions of the places they have visited.[43]

UGC and eWOM allows travel researchers to get a sense of what an experience would be like before they make a financial commitment to purchase. Consumers are keen to research the opinions of those who have visited before them because travel is not a tangible product that can be tested before committing to a purchase: a car can be test-driven, a vacation cannot. Furthermore, eWOM is especially important to consumers during the initial travel research phase as it helps them narrow down their choices,[44] and is also heavily used to research more expensive and important travel purchases like accommodation.[45] According to the TripBarometer Survey conducted by Ipsos, 46 percent of respondents used TripAdvisor, 28 percent used search-engine reviews (e.g. reviews on Google), and 23 percent of travelers used content posted by other travelers when deciding on their destination.[46] TripAdvisor was found to be the key source of information at many stages of the planning and booking of a journey, with users often browsing TripAdvisor without a specific holiday in mind — giving destinations an opportunity to influence consumers.

As further evidence of the importance of UGC, comScore found that 74 percent of worldwide online travel bookers visited TripAdvisor, and 57 percent of hotel-specific bookers visit TripAdvisor first before making a purchase.[47] The impact of UGC is even more apparent when looking at the travel behaviors of millennials, 89 percent of whom plan travel activities based on content published online by their peers.[48] An *Adweek* survey found that 52 percent of Facebook users think about travel while on the platform even when they are not planning a vacation, and this number increases to 87 percent for millennials who use the social network for travel inspiration.[49]

Figure 2: Key Sources of Travel Inspiration
Source: Ipsos Ipsos MORI and TripAdvisor (2017). TripBarometer 2016/17

44% of travelelers used **TripAdvisor**

22% of travelelers used **content posted by family + friends** when deciding on their destination

38% of travelelers used **word-of-mouth** information

22% of travelelers used **media** when deciding on their destination

26% of travelelers used **travel guide** websites
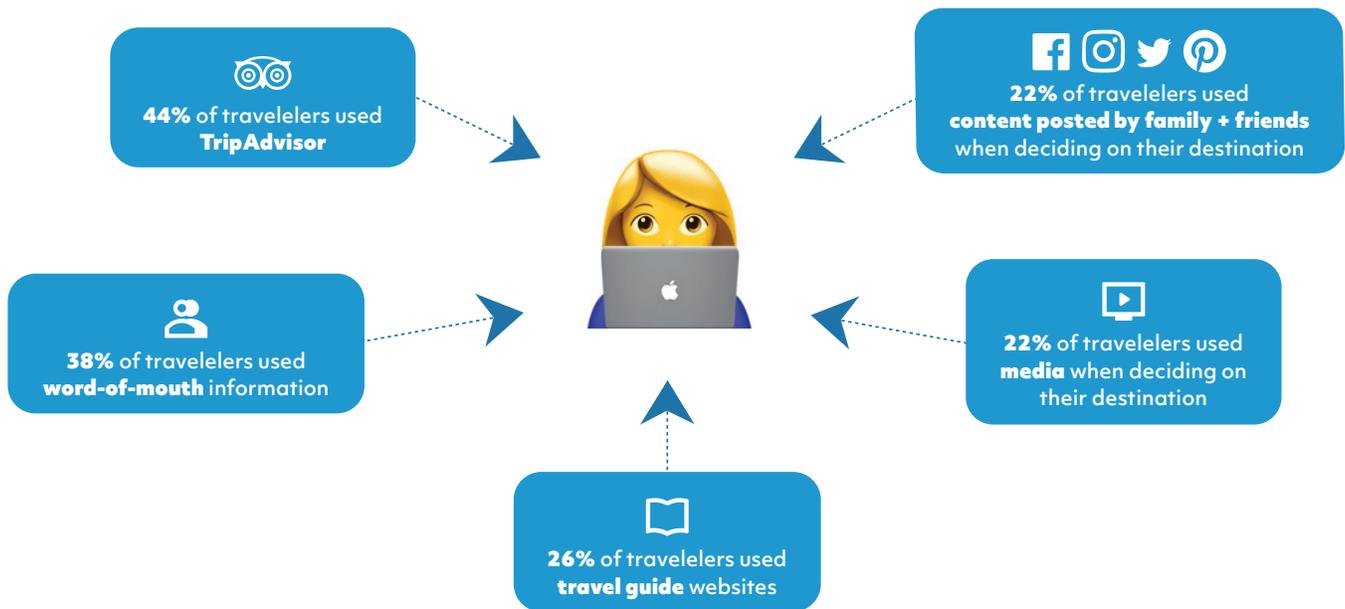
Millennial travelers are also driving content creation trends according to a study by Chase Marriott Rewards. Nearly all (97 percent) of millennial travelers post on social networks and share experiences while traveling, 73 percent post at least once a day.[50]

Potential customers are most likely forming an image of a product or service before they experience it. That image can be different from what the destination or business is using in their messaging — if the consumer sees the brand messaging at all. UGC is also not perceived as sales material, but rather genuine shared experience. This increases the level of trust and perceived value. A Facebook study of Instagram users found that 61 percent of Instagrammers use the platform to "travel like a local" and to find things to do on when traveling to a new place.[51] This may offer opportunities for less-developed destinations to expand their tourism value chain.

User-generated content impacts the purchasing behavior of tourists. Knowledge of the digital landscape coupled with the right strategies and tactics will help destinations and businesses become more competitive and use their marketing and product development resources more effectively.

Why UGC Matters

Here are the top 10 reasons why UGC and social travel platforms matter to destinations and to tourism businesses:

1: Drive Revenues

In 2017, TripAdvisor was responsible for US$546 billion of global tourism spend according to a study by tourism research firm Tourism Economics. US$80 billion (15 percent) would not have occurred without TripAdvisor. This influence has grown at a 7.4 percent annual average rate over the last ten years.[53] The study also found that increases in TripAdvisor reviews are followed by higher tourism demand and increased nights at the destination. As the industry publication *Hotel Management* puts it: "That means TripAdvisor leads travelers to a longer length of stay. That impact also pertains to travelers who were already planning trips or who were already in destinations and TripAdvisor use caused them to stay additional nights, thereby creating extra spend."[54]

The power of UGC extends beyond TripAdvisor to other UGC platforms and booking channels, and to the content itself. Many destinations and businesses have leveraged UGC in their marketing campaigns to both drive revenue and reduce the costs of content. For example, Loews Hotels launched a travel campaign with the hashtag #TravelForReal to generate UGC for use in its marketing channels. The hotel chain saw a 62 percent increase in social engagement and a four-fold increase in their revenue from bookings after deploying the UGC content in their marketing.[55] Similarly, group tour operator Busabout had similar results when incorporating UGC across its website, online map, social channels, and other marketing channels. The company saw a 12 percent increase in website traffic and a 9 percent increase in bookings and realized a 62 percent savings in content costs.[56]

2: Increase Access to Market

Platforms like TripAdvisor, Facebook, and Twitter offer destinations and businesses an online presence and a direct connection to travel consumers through business accounts. Travel organizations can create business accounts to communicate their value proposition, conduct paid advertising campaigns, engage with the travel audiences, and respond to customer inquiries on each platform. There is always a cost: whether it is time spent engaging on each platform or advertising spend. But the playing field is becoming more level and destinations no longer need multimillion dollar marketing budgets to be successful.

"In less than a decade, UGC has evolved from reviews posted on websites into multiple-platform initiatives that are a primary and powerful mainstay of the digital and social media marketing strategies of many brands in travel."


Source: Travel Research Firm Phocuswright[52]

Figure3: Net impact of TripAdvisor length of stay (nights)

Source: Tourism Economics

US$ (billions)

New trips & destinations	Average length of stay (nights)	Value for money	Net overall revenue impact
1: Information in TripAdvisor reviews cause additional trips worldwide, including to new desitinations.	**2:** Reviews and scores encourage longer stays in new destinations and properties.	**3:** Travelers are able to find savings with a clearer understanding of destination quality. Partly offset as individual properties can offer a premium for quality.	**4:** Net positive impact as new trips and longer stays offset cost savings for destinations. Spend per trip rises even as spend per day falls.

3: Leverage Consumer Content

Destinations and businesses can leverage the content created by consumers to market their businesses. Consumers trust other people 12 times more than they trust brands, which is why brands use UGC in their campaigns.[57] Many new destinations and businesses do not have a lot of high-quality content to use in marketing themselves. By using increasingly sophisticated cameras on mobile phones, visitors to a destination can now quickly create content which represents the perspective of the traveler. Visual content curation platforms, such as Crowdriff allow travel businesses and destinations to source publicly available content legally for use on their channels.

Smart management of travel content shared by visitors and online communities can become an effective marketing message. Tourism Ohio (@Ohiogram) saw 10 percent higher engagement when using UGC.[58]

Jordan Tourism Board North America relies heavily on UGC to communicate its value and the security of the product. "UGC is the most important thing to our organization in reaching travelers in North America. It is gold for us and it is free," says Samer Abu Taleb, Trade Partnerships & Consumer Marketing Manager at Jordan Tourism Board, North America. For more details on how Jordan leverages UGC, see the case study in Section Three.

4: Build Competence

Effectively and efficiently managing platforms and content takes time, money, and specialized skills. The skills needed include writing, digital marketing, and public relations. Destinations often need to acquire different software platforms to manage content (see Table 2) and hire new talent to curate and create online content that maintain and grow these channels. Missteps on social media are public and can have serious consequences. Global hotel conglomerate Marriott International's websites were shut down in China in part due to an employee liking another user's post, which declared Tibet and Hong Kong to be independent countries, from Marriott's official Twitter account.[59] United Airlines came under fire after multiple instances of mishandling social media in relation to several high-profile events that went viral on social media through user content, primarily on Twitter. A recent graphic post was accidently tweeted out by US Airways, which resulted in negative press for the airline.[60] Additionally, destinations and businesses need to navigate the legalities of sharing UGC and data privacy (see page 40 for more details).

5: Monitor Performance with Big Data

UGC can also provide new and real-time data on consumer behavior, allowing destinations and businesses to improve their performance. Organizations can audit user-generated content via listening tools and aggregators to see what kinds of experiences travelers are interested in and what they post about. This information can be used for product development, marketing insights, destination management, and benchmarking. Various tools have emerged to help destinations and businesses manage the data on their performance, see Table 2 for further information. The WBG group is also leveraging UGC to monitor performance as part of its work with the government of Indonesia to improve the competitiveness of the tourism sector. While the project is still in its early stages, the case study in Section 3 shows the potential applications for UGC in development work.

6: Improve Quality

Feedback from customers allows businesses to improve their product offerings. Social platforms are a forum for customers to provide real-time feedback and raise issues without the social pressure of voicing concerns in person. This provides a free way to understand what issues need to be addressed which helps make businesses much more efficient and successful. Hotels are using UGC to identify and correct service issues. Furthermore, online reviews can be used to assess the impact of team training, service quality, and investment in upgrading. For example, a hotel investing in customer service training might monitor reviews before and after the training to see whether there was a change in sentiment and score. The Puerto Rico Tourism Company used UGC to assess product quality on the ground following a series of hurricanes that hit the U.S. island territory. Learn how Puerto Rico used UGC and TripAdvisor to manage crisis communications following the natural disaster in Section 3.

7: Predict Performance

Research has shown that review ratings are one of the most important predictors of hotel performance. A recent study by *Cornell Hospitality Quarterly* found a close correlation between a hotel's review ratings and its financial performance. A similar correlation was found between high response to negative comments and financial performance.[61] The study also found that managerial responses to UGC on OTAs and UGC platforms also improved hotel performance and managerial response rate correlated with increased sales. "Responding to reviews, particularly negative reviews, appears positively related to the consumer's view of the hotel, as measured by increases in the TripAdvisor score."[62] Another study found that accommodations that respond to over "50 percent of social media reviews grow occupancy rates at more than twice the rate of properties that tend to ignore reviews."[63] Despite the evidence pointing to the importance of online reviews and the impact that managerial responses have on customer perception, many businesses don't engage with online reviews nor do they have a policy for managing them.

Figure 4: The Virtuous Circle of Guest Engagement

Source: TripAdvisor
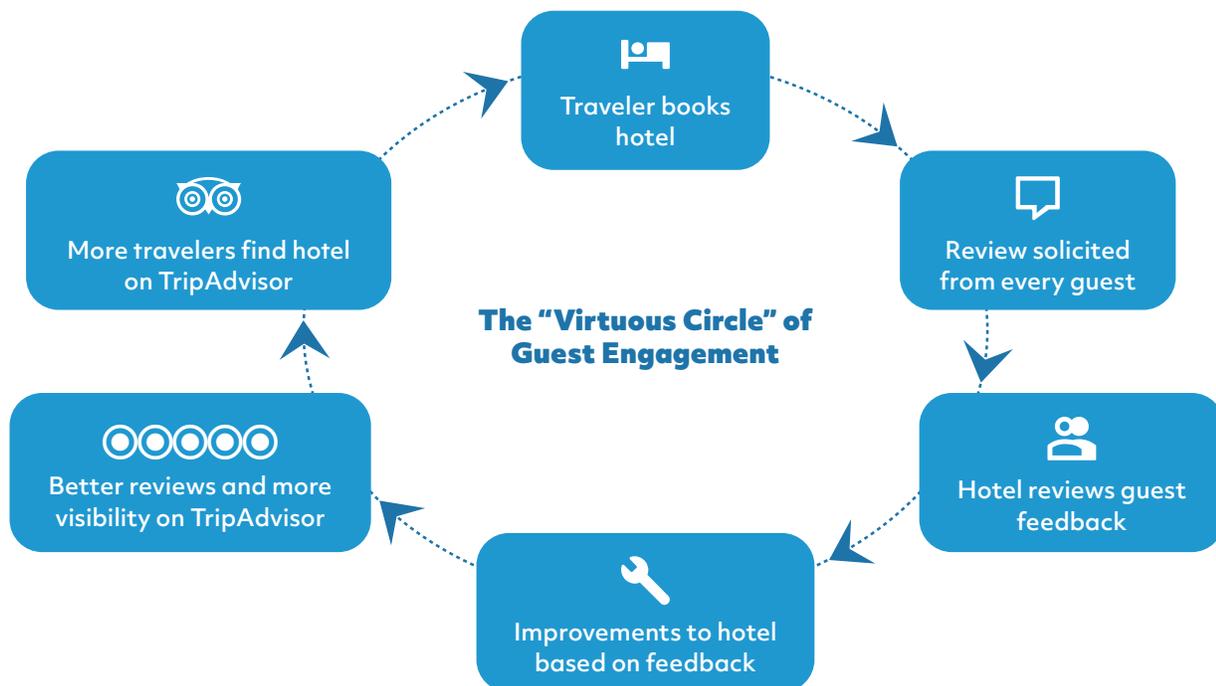
The "Virtuous Circle" of Guest Engagement

- Traveler books hotel
- Review solicited from every guest
- Hotel reviews guest feedback
- Improvements to hotel based on feedback
- Better reviews and more visibility on TripAdvisor
- More travelers find hotel on TripAdvisor

8: Benchmark Competitors

UGC and public social media sites offer destinations and businesses the opportunity to benchmark against competitors and aspirational targets. Destinations can see how their competitors perform in different product categories and what their competitor's travelers are considering. Benchmarking against other destinations' or businesses' social media sites helps allows insight into which content travelers are most receptive to. Keeping track of "shared" and "liked" social media posts gives a good indication of consumer trends and ultimately helps make marketing more targeted. Managers can also keep track of competitors' social media activities. Global travel sites such as TripAdvisor can tap into a vast amount of user data to help destinations understand which destinations they are competing against and where they are falling short. Such competitive destination analyses reveal which destinations users are looking at in the same search session, where those users come from, and what role seasonality plays in their search patterns. For example, Resonance Consultancy, a U.S. consulting firm specializing in tourism, real estate, and economic development, has leveraged TripAdvisor data and other data sources to create the Caribbean Tourism Quality Index, which is used to benchmark different tourism destinations and assist its client Bermuda Tourism Authority (see case study 2).[64]

9: Influences Online Image and Exposure

UGC impacts the way a brand or business is perceived and listed. For destinations, review content contributes to what some researchers call Tourist Destination Image (TDI) or the image that a traveler has of the destination that is a composite of news, branding, user reviews, and other information. This image has an impact on the consumer's decision to visit a destination.[65] Reviews are also often used by booking platforms to determine the order in which to list businesses. The online travel agency (OTA) Expedia, for example, lists properties according to reviews: properties with more positive ratings are ranked higher than properties with low or no ratings. Expedia recommends that properties pay attention to reviews and learn from their customers' feedback to improve business practices.[66] Aggregated UGC can also be filtered to select content aligned to brand values or destination strategies.

10: Measure Marketing Return on Investment (ROI)

User-generated content is updated in real-time and can often reveal new data about a destination more quickly and cost effectively than surveys or other forms of information. Destinations are always challenged with measuring the ROI of their marketing, training, and management efforts, especially since they are not the end providers of the travel experience. Destination managers often rely on visitor arrivals and spend numbers, but those numbers are difficult to attribute directly to local efforts and that data is often only collected annually. UGC can reveal interest in a destination, how businesses are performing, tourism management issues, the effectiveness of business training sessions, and other data.

SECTION 2
UGC, Platforms & Good Practices

UGC, Platforms & Good Practices

UGC Platforms

The impact of user-generated content on travel destinations depends on the strength and reach of online platforms used to publish it. There are 3.2 billion people who use social media; this is up 13 percent from last year and translates to 11 new people using social media every second. Central and Southern Asia are driving this growth.[67] Facebook is taking advantage of that growth and is now the leading social network in 91 percent of the world.[68] UGC platforms keep emerging and many market-specific social channels have great relevance and impact: Yelp is one of the largest UGC/review channels in the USA, Line is prevalent in Japan, HolidayCheck is popular in Germany, and VK is popular in Russia as is Odnoklassniki. It is important to determine a business or destination's appropriate target audiences and find out which platforms these audiences use before investing in any UGC channel.

The following is an overview of the major public UGC platforms with the largest global audiences and biggest impact on the travel industry. This list does not include peer-to-peer messaging apps like WhatsApp.

Enver Duminy
Cape Town Tourism CEO

"As Cape Town Tourism, a method we have found to be very effective is harnessing the age old power of word of mouth — we've created strong social media platforms to allow visitors to share their experiences, which are then read by a multitude of potential visitors; and we also use other social sharing platforms like TripAdvisor as listening tools. We'll pick up on conversations the various markets are having about the destination and then create content on our blog and social media platforms that speak to what they're searching for." [69]

Table 1: Major UGC Travel Platforms

| Channel	Audience Size	Reach	UGC Function
Blogs	2+ million blog posts published daily[70]	Globally, various providers globally	Long-from travel content and tips from bloggers, influencers and other content creators.
Facebook	1.45 billion daily active users on average for March 2018 2.20 billion monthly active users as of March 31, 2018[71]	Global excluding China, North Korea and Iran and various temporary bans	Crowd-source travel tips, share articles, upload photos and videos of trips, live stream travel experiences, check in to travel destinations and experiences, and post user reviews. Much of UGC content from consumers is posted privately.
Instagram	800 million+ monthly active accounts 500 million+ daily active accounts[72]	Global, except China	Real-time content, live video and photos via Instagram stories, photos, videos and more.
SnapChat	158 million users spending 25–30 mins a day	Number one iphone App in 13 countries and number 2 or 3 in 15 others	Real-time content, live video, stories, short text and more. Content is short term and constantly renewed.
TripAdvisor	455 million average monthly unique visitors	49 markets	Reviews, photos, Q&A and forum posts are added by users for hotels, restaurants and attractions.
Twitter	330 Million monthly active users[73]	Global excluding China, North Korea and Iran and various temporary bans	Travelers share photos, tweet at brands and engage with travel influencers.
WeChat	1 billion user accounts 902 million daily users[74]	Primarily Greater China	Post content, engage with brand accounts, book travel, message friends while traveling and more.
Weibo	340 million active monthly users[75]	Primarily Greater China	Publish text, image and video posts, influencers use this platform to talk about travel
YouTube	1 billion+ users[76]	Global excluding China, North Korea and Iran and various temporary bans	Travel guides, video blogs, short destination clips, packing guides and more.

TripAdvisor Deep Dive

TripAdvisor is the largest digital travel platform worldwide. It had an average of 456 million monthly users accessing the site in Q2 2018, reaching one in 11 traveler researchers.[77] While originally most popular in mature tourism markets, emerging markets are getting increased exposure on the platform. In April 2017, travelers from Western Europe added approximately one million reviews to TripAdvisor. More than twice as many reviews were added by the same audience in April of this year. Over the past five years, the average growth rate of reviews posted by travelers from the Middle East, Asia, and Eastern Europe was 21 percent, 18 percent and 10 percent respectively. Travel buyers who use TripAdvisor are considerably more active during the path to purchase and take 29 percent longer to research their vacations compared to buyers who don't use TripAdvisor.[78]

Figure 5: Number of TripAdvisor Reviews by Region

Source: TripAdvisor, Number of collected user reviews, Sept. 2012 – March 2018
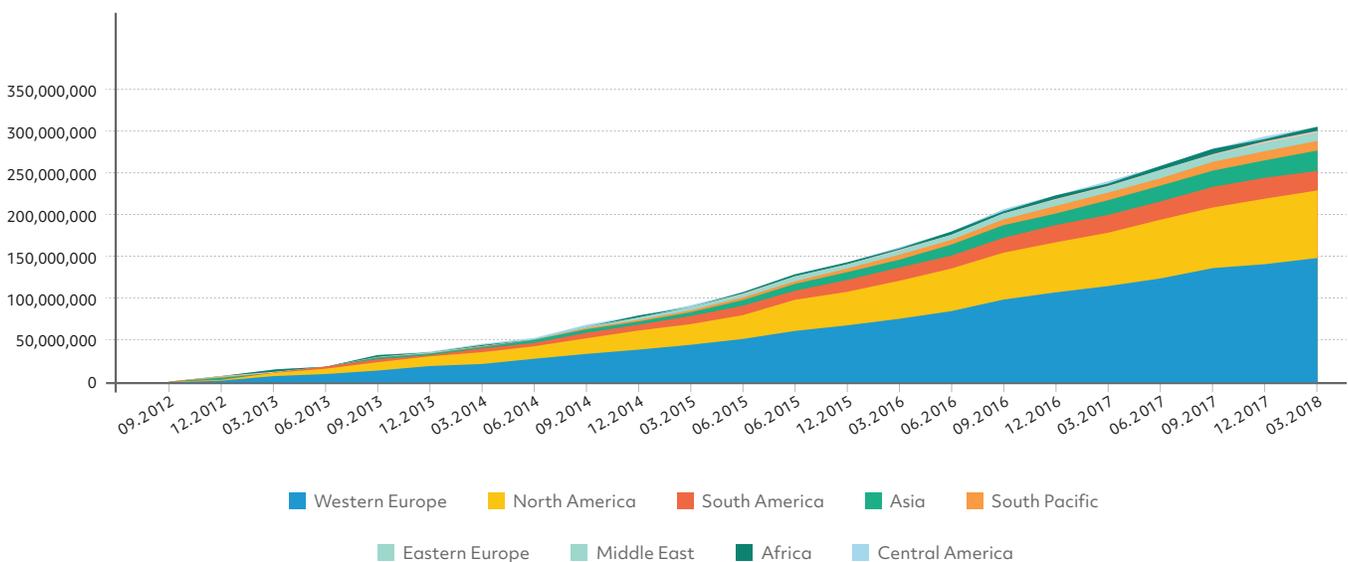
Content & Content Creators

Anyone can create content: individuals, businesses, and professional content creators like writers, bloggers, or influencers. However, users need access to a computer or mobile device, strong communication ability, the necessary technology skills and a reliable internet connection to create content. These prerequisites can limit the user base and the perspectives of UGC. There is still a digital gender gap: in two-thirds of countries worldwide, internet usage rates are higher for men than for women.[79] However, the tide is changing as TripAdvisor, Facebook and other UGC websites are becoming increasingly accessed on mobile and the platforms have developed easier to use 'light' applications. Users can now find a greater number of voices and perspectives represented online, making UGC more inclusive to various travel audiences.

The variety is represented in the different kinds of travel blogs, travel hashtags and content for different areas of the world and travel needs. Travel audiences like solo women, adventure travelers, family travelers, people with cognitive or physical disabilities, and LGBTQ travelers publish their content online, which reflects their perspective and travel needs. Travelers in these demographics often seek out this content because they find UGC more trustworthy than other sources of content and find UGC more reliable if the information is relevant to them and their travel needs.[80] For example, LBGTQ travelers often rely on UGC to find LGBTQ-safe and friendly destinations.[81] There are thousands of posts on Instagram tagged with the 'solo female' hashtag and offer travel tips for other female travelers. Niche websites and content also allow destinations and businesses to be hyper-targeted in reaching these audiences with their value proposition and open areas for partnership.

Given this landscape, here are some of the common reasons travelers post UGC:

Altruism: travelers want to help other travelers like them. Many travelers see value in the reviews they read and so post their own reviews about their own experiences to continue the "virtuous circle" of sharing.

"Humble brag": sharing great experiences online may sometimes be another way to boast and improve social status.

To become "instafamous": related to the humble brag, travelers often share their content online to get "likes." Many use popular hashtags because they hope to be featured online and they want to help their content go viral so they can gain advertising revenue.

Updating family and friends back home: instead of delivering a slide show when they get home, travelers can now update and share with their loved ones as they go, sharing their travel experiences in real-time.

Document their vacation: many travelers publish content about their vacations to help them remember where they went, what they did, and to later relive their meIpsos MORIes. This varies from sharing moments via single images to progressive stories with multiple images, video, and location check ins.

Content Types

Vast amounts of content are created every day, offering insights and content to showcase different travel experiences. For example, 308 million (and counting) Instagram posts have been tagged with #travel to date, hundreds of Twitter posts are tagged with #travel every hour, and 300 hours of video are uploaded every minute on YouTube.[82]

Most importantly, this content is posted in real-time, turning each traveler's trip into a live experience communicated to an audience who knows and trusts them. Platforms such as Instagram Stories define and package travel experiences into a story format ideal for marketing. The content is nearly always geotagged, via GPS on smartphones, or by direct check-ins, allowing this content to be linked directly to destinations and businesses. The use of location data and hashtags allows UGC to be aggregated and discovered by marketers for their use. This content is also a rich information source yielding such valuable consumer behavior data as travel destinations, activity preferences, travel styles, and booking windows that can be used to improve destination marketing and product development.

The audience for this content is not passive: they engage with this content via likes, comments, shares, video message replies, and emojis. These public and private actions are measurable as vital statistics for audience response, preferences, and trends.

Content:

Reviews: a combination of ratings, text and images (depending on the platform), user reviews share travelers' direct impressions of a destination, tour, hotel or travel experience. They can be found on TripAdvisor, OTAs, Facebook, Google and other travel sites.

Travel Tips: travel tips tend to be geared towards the destination instead of towards a supplier. Travelers share insights on their experiences, the best places to go, ideal times to visit, and places to avoid. This content is posted on TripAdvisor, blogs, and other travel forums.

Pictures: many social media users upload images of their vacations in real-time during their vacations. The images are often of hotel rooms, food, and tour experiences. They offer an unfiltered view of the vacation. This is the most commonly curated type of content and is found on virtually every UGC platform.

Blogs or long-format articles: detailed accounts of travel experiences including activities, hotels, travel tips, and other experiences are often self-published on blogs or in other fora. This content is ideal for social sharing and offers an opportunity for sponsorship or other forms of collaboration.

Videos: ranging from seconds-long videos on SnapChat or Instagram stories to feature-length videos and webisodes, there are countless hours of travel videos posted online. They range from low-tech cell phone videos to high production-quality YouTube videos.

Live videos and social posts: many social networks have launched live versions of video, allowing users to broadcast on location. These videos are broadcast in real-time and are often stored on the platform for users to view after the broadcast is concluded. Live video content is becoming an increasingly popular way to share content both for consumers and brands. Platforms like Facebook are investing in growing this market.

Timelapses, boomerangs, and gifs: content creators are also using mobile applications to create videos with unique features, such as actions on loop, videos which speed up or slow down the action to show a journey. There are other forms of rich media which can be used by brands to appear "on trend."

Influencer Marketing

Destinations and brands are increasingly investing in user-generated content for hire, also known as influencer marketing. Both mature and emerging destinations gravitate towards this kind of content because it can showcase the local experience in a more authentic way through an influencer's unique lens. Influencers also give destinations a new audience, such as their followers if they run a successful blog, although this varies according to the influencer. Influencers can be especially helpful to low-income destinations. They can create high-quality, experiential content about a destination, which is something that new destinations struggle with. They also increase awareness of new destinations as many travelers either don't know about these destinations or are wary of traveling there because of preconceived notions. The Jordan Tourism Board leverages influencers in their marketing to communicate the security of Jordan and to share their unique attractions. "Influencers speak to their audiences and their audiences trust them. Once they come back from Jordan, influencers continuously talk about Jordan and we see large ROI from that," says Samer Abu Taleb, Trade Partnerships & Consumer Marketing Manager at Jordan Tourism Board, North America.

However, working with influencers can be complicated, costly and risky. In contrast to traditional travel media and public relations efforts, influencers are most often independent content creators who manage their own channels and audience. It is difficult to control their message and the norms of the travel press don't always apply. There are many professional influencers working in travel, but there are also some scammers. Destinations should be on the lookout for fraudulent traffic, inflated or paid-for fan numbers, and off-brand content.

It is important for destinations to approach influencer marketing with a plan and with a cost-benefit analysis to other forms of marketing. To maximize results and mitigate risks, it is recommended that influencer marketers follow these steps:

1: Define the goals

Just like any marketing campaign, articulate the goals before working with any influencer in any capacity. Make sure that the influencer campaign is coordinated with overall marketing efforts in other channels.

2: Identify potential influencers and analyze their target audiences

Determine which audience segments to target and find influencers who meet the needs of the campaign. Many destinations seek the assistance of an influencer marketing agency or of influencer marketing tools (see Table 2).

3: Review potential influencers' content

Reach is not the only factor when selecting an influencer. Make sure the selected influencer(s) fits the brand's tone, feel, audience, and campaign. Measure actual engagement with their content. Also request proof, via tracking or conversion pixels, that their content has generated provable leads to travel suppliers.

4: Scope and negotiate

Set up the terms of the agreement or contract. Include as many specifics as possible covering compensation, travel, and costs covered, number of posts, content types, reporting parameters, and content rights so that deliverables are clear

at the outset. The more influential the influencer is (i.e., the larger their fan base and engagement levels) the more they will charge. Some destinations now treat influencers as suppliers and do not pre-finance their travel and production. Instead they buy their content after it has been produced based on quality and alignment with brand goals.

5: Make an influencer media kit

Make it easier for the chosen influencer(s) to engage with the destination by providing a social media kit. Include essential information, fun facts, images, hashtags, and social media handles in one document.

6: Execute the campaign

Set up the campaign and follow along with the posts to foster engagement, monitor compliance, and ensure on-brand messaging. Brands sometimes opt for a social media takeover, where the influencer posts on the brand's channels or the influencer shares the content from the influencer. Make sure to include a note if content has been sponsored or is an advertisement.

7: Evaluate

Conduct post-campaign analysis. How did the campaign perform in relation to the goals that were set? What was learned from this campaign that can be applied to other campaigns? Did the influencer meet the terms of the agreement? It is important to track the results by directing links to measurable landing pages with tracking codes and use conversion pixels.

UGC Tools & Software

Software and other tools can assist tourism organizations in navigating and managing the UGC landscape. They can be used to monitor brand performance, organize and manage user-generated content, manage online reputation, aggregate data and more depending on organizational needs. An overview of tools is provided below:

Table 2: UGC and Platform Tools and Resources

Tool/Software	Use Case	Additional Features	Sample Suppliers	Software in Action
Social Listening[83]	Monitor brand/destination sentiment and mentions of your organization, destination and product	Influencer identification, determine your net promoter score	Radian 6, Crimson Hexagon, Sprout Social	Tour operators use social listening to connect with potential clients
Content Curation	Identify, source, secure and store user-generated travel content for a destination's use in marketing and branding activities	Some platforms include legal permissions and direct publishing	Chute, Crowdriff, Curata, Olapic, Stackla, Tint	Destination Canada uses Crowdriff to curate travelers' images of Canada and share them with partner destinations
Social Media Management	Organize, manage and publish on social media channels	Some software also stores assets, publishes to blogs and allows for paid advertising	Hootsuite, Percolate, SproutSocial, TweetDeck, etc	Many Western DMOs use a variety of management tools
Reputation Management	Manage and monitor your online reputation across a variety of platforms	Respond to comments and upload images	ReviewPro Guest Revu	How YHA New Zealand climbed TripAdvisor rankings
Data & Analytics	Bring in data from various sources like Google Analytics, paid media, Facebook, Twitter, email marketing	Automatically published reports, data visualization and virtual dashboards	Simply Measured, Tableau, DataHero, Microsoft Power BI	Travel Utah uses data dash-boards to pull in content from many sources
Digital Asset Management (DAM)	Stores, catalogues and shares your organization's digital assets	Many tools allow you to create galleries, take downloads, share assets and press rooms	Acquia, Barberstock, Libris, MediaValet, WebDam	Brand USA uses MediaValet to store, organize, share and track its multimedia

UGC in China

China is predicted to become the largest outbound tourism market in 2022 at 128 million tourism trips.[84] Destinations and businesses are already trying to attract these important travel consumers, but the digital marketing landscape and consumer behaviors are very different in China. Many platforms such as Google,Facebook, YouTube, Instagram and messaging tools likes WhatsApp are restricted in China as the internet is highly regulated. This makes China's digital landscape unique and mysterious to foreign brands. Destinations that are marketing in China are using more traditional means. They are missing out on the growing number of FIT travelers, who are typically younger, more tech savvy, and more adventurous than their parents. Accounting for 60 percent of the country's foreign travelers in 2016, 18 to 34-year-olds take 82 million trips abroad and spend more than US$150 billion.[85]

UGC is king: UGC is highly valued in China and is seen as more effective than other forms of marketing. FIT travelers turn to WeChat, video platforms, UGC travel channels such as Mafengwo and Fliggy, and other social media channels to find information, plan, book, and guide them through their trips. Research found that while planning their overseas trips, 72 percent of Chinese travelers are influenced by digital media such as travel websites, social media platforms, online travel agencies, and social trip planning platforms.[86]

Mobile first: Mobile users account for 97.5 percent of all Internet users according to CINIC's 2017 report.[87] This means successful brands are mobile-first. It is vital for an account's content to be optimized for mobile.

WeChat is everything: With more than one billion users and 900 million daily active users, WeChat is the most used app in China. It is called an "everything-in-one" platform as its functionality mimics a combination of Facebook, WhatsApp, PayPal, Uber and e-commerce sites.[88] Launched in 2017, WeChat's new in-platform app, Mini Program, enables even more possibilities for brands on WeChat. The platform has become a way of life for Chinese citizens and big brands are often replacing their entire website with a WeChat channel as more than 50 percent of users spend more than 90 minutes a day on the platform.[89]

Video: Micro-videos (less than 2 minutes) and live streaming have become extremely popular in China over the past two years. The new micro-video and live streaming platform Douyin grew to 100 million users within a year and had more than one billion daily video views.[90]

TripAdvisor: one of the few platforms not restricted in China, and the Chinese audience on TripAdvisor is growing year to year. The number of Chinese travelers using TripAdvisor as a source to research and book both leisure and business trips to destinations outside of China has risen by 39 percent since 2016. Additionally, the number of reviews shared by Chinese travelers on TripAdvisor has seen an increase of 41 percent over the past five years. A recent study conducted by Oxford Economics showed that TripAdvisor influenced 12 percent of the total Chinese inbound travel market in 2017.[91]

Content Curation & Ownership: Mitigating Risks

The use of UGC has legal implications. While UGC is a valuable resource for travel organizations when posted publicly, UGC often falls into a legal gray area as it is posted by individuals and not by official organizations. Destinations and businesses need to be informed on the risks of UGC before engaging with the content. Some of the legal considerations include: [92]

1: Ownership and Licensing

Who owns UGC and how are the rights to use it granted to the destination or business. Many travelers are happy to share images of their vacations with DMOs and other travel companies, but improperly using this content can put a destination or travel company at risk. Depending on the organizational charter, DMOs, NTOs and other tourism organizations might fall under public domain or regulations that apply to the government.

2: Privacy

While images may be posted publicly on social media, people represented in those travel pictures may not have consented to be photographed and for that photograph to be used in destination marketing.

3: Monetization

For-profit organizations need to be especially cautious when using UGC. They must be diligent about securing permissions for UGC as different laws apply to intellectual property when it is used for commercial purposes. It is also recommended that they ask users for permission to use their content.

4: False Statements

Sometimes users post false claims or inaccurate statements about travel destinations, business or other facts in their content. It is always a best practice to check the content before posting.

Content curation guidelines should be created for each organization and be determined by each organization's legal framework. Check the country's copyright laws and/or the organization's legal counsel on the appropriate laws and regulations before launching any content curation activities. When a user signs up to use a UGC platform, they are presented with the terms of service, which outlines the terms of engagement for the platform including content sharing.

There are generally three types of content curation: on platform, off platform, and between platforms (API embedded). The type of content curation dictates what kinds of legal permissions are needed. Destination managers are most legally protected when they ask their users for permission to use their content, especially photos and videos. This serves the purpose of legal protection and builds a relationship between the brand and consumer. Advanced Social Media aggregators, such as Crowdriff and Stackla offer what is called Automated Rights Management (ARM), which allows the content manager to systematically request the copyright from the author with set terms and conditions, which is delivered via the selected social media platform messaging tools and contains a simple automated response system which generates an immediate waiver.

On-Platform Curation & Publishing

"On-platform curation" is the most common and requires the least effort and legal protection, as social media is shared easily between users on the same social platform. With one click, destinations can share a traveler's public Facebook post or retweet (share) a travel influencer's Twitter post. On YouTube, brands can place videos from other accounts on their own channel's playlist. These actions generally require no prior permission.

However, on Instagram, content sharing is not as straightforward. The application does not allow users to share in the same way that other channels do, so it is a good practice to ask for permission. Some brands ask for permission by creating and advertising a specific branded hashtag related to their destination like #TravelAlberta, #Colombiaissabrosura, #MeetSouthAfrica or #ShareYourJordan.

Off-Platform Publishing

"Off-platform curation" takes place when a destination or brand downloads content from a social platform like Instagram or Twitter, and uses it on another platform outside of that social channel, such as a website or a print ad. This off-platform use typically requires the content owner's permission. YouTube is an outlier, as videos are easily and legally embedded on websites without requiring permission. This can be very useful for destinations or SMEs with limited content. Organizations can get permission to use a piece of content by asking for permission in a comment or by having users agree to their terms and conditions using Automated-Rights Management as outlined above. While having users agree to terms and conditions is more involved than using comments or hashtags, the process offers destinations and businesses greater protection because it discloses the potential use of the content. This process can be facilitated by using the content curation tools in Table 2.

API Content Embed

An Application Programming Interface (API) allows two different applications to talk to each other directly. Content can be embedded on a website using an API from a social media site. For example, you can embed social media posts in your website so they appear in the same format as on the original platform. For example, TripAdvisor allows organizations to embed user reviews relating to their business on their own website.

Credibility & Fraudulent Content

It is important to ensure all content posted directly is by a credible source and that there are no issues concerning ownership. All posts need to adhere to platform guidelines. All reviews must be authored and submitted following a genuine experience. When encouraging travelers to write reviews, be careful not to encourage people to give a specific rating. Doing so may infringe the host platform's content policies and guidelines.

Table 3: The Do's and Don'ts of Content Curation

DOs	DON'Ts
Credit the user or account when sharing UGC	Post content as if it were created by your organization
Ask for permission in a comment or providing Terms and Conditions for use	Take content without asking for permission to use (this includes privately posted content and photos of minors as they cannot provide consent)
Contextualize the content with additional information about the UGC showcased to the reader can learn more about the experience	Include inaccurate information about the experience. (Check your facts!)
Search for content using hashtags, location tags, handles and more	Post content that is not actually of your destination or brand
Share other brands' or partner content	Use content offline or in a channel that rights were not granted for
Track assets used with written consent	Publicly share private content
Watch videos or content all the way through before sharing	Post content with copywritten music or other content without permission
Outline the organization's entire use case in T&C's so that the organization and its partners are legally covered	Share UGC with partners or businesses that do not have rights to use it

SECTION 3

Case Studies

Section three includes a selection of case studies that highlight destinations and brands that have successfully leveraged UGC to increase traveler awareness and strengthen competitiveness. The case studies are indicative, not comprehensive. It proved challenging to find case studies of UGC used to improve specific products or to address specific development challenges. The potential is there, however, and will be the focus of future research. Most case studies showcase the destinations' approach to marketing, but a few include broader applications of UGC, which are likely to increase in importance in the future.

CASE STUDY 1:

Jordan's Multichannel Adoption of UGC

Tourism is one of Jordan's most important economic sectors. Travel and tourism made up 19.4 percent of the country's GDP in 2016 and is forecasted to rise by 4.4 percent in 2017 to 22.3 percent in 2027.[93] But Jordan suffers from being "the quiet house in a noisy neighborhood," as Janine Jervis, deputy director of the Jordan Tourism Board North America, puts it.[94] The Middle East and North Africa (MENA) region is constantly plagued with news of violence and civil unrest, which impacts travelers' perception of Jordan as a tourism destination and reduces visitation. Reassuring the travelers that Jordan is safe for visitors is of the utmost importance.

In fact, JTB has adopted UGC in most of their communications. JTB North America launched an entire website and social media campaign dedicated to UGC: #MyJordanJourney and its website MyJordanJourney.com features UGC, testimonials, and other traveler content to showcase the product to both consumers and the travel trade. JTB also leverages residents' content as part of UGC. The tourism board deploys the content of real people and shares it with their audiences so that people can imagine themselves in Jordan. TripAdvisor is a key partner for Jordan as well.

Samer Abu Taleb

Trade Partnerships & Consumer Marketing Manager at Jordan Tourism Board, North America: [95]

"How do you tell the traveler that is scared and worried about the Middle East that we have a secure product? (...) UGC is critical to instilling trust in visitors and communicating Jordan's value proposition. It is so much more effective than having a campaign. (...) We have also embraced TripAdvisor throughout our communications because the reviews are awesome. People trust TripAdvisor because they are able to read reviews of what other travelers have experienced. It has helped us communicate the product of Jordan."

Jordan Tourism Board's head office has invested in a social media aggregation system via Stackla and uses this tool to gather, select, and share visitor photos under their #ShareYourJordan hashtag. The system also helps them to identify visitors whose content and photos receive the highest volume of engagement and engage with them as potential future ambassadors and influencers. The tool is also being used to create social hubs on a newly developed website.

UGC also played a role in Jordan's recently launched product: the Jordan Trail. This 680km hiking trail, which was developed through a partnership with USAID, connects travelers with important historical sites and 52 towns and villages. It increases the country's rural tourism product and incorporates homestays. To launch the trail, JTB partnered with the travel trade, marketing partners, and social media influencers, and curated content from travelers. The Jordan Tourism Board also hired digital marketing influencer Andrew Evans to join the annual hike with the Jordan Trail Association and share his experience. JTB used Stackla's hashtag feature to source and aggregate Andrew and the other hikers' photos on the hike and built daily Instagram Stories from these compiled images. The hike was timed with ITB in Berlin. The tourism board used Stackla to create a living wall of
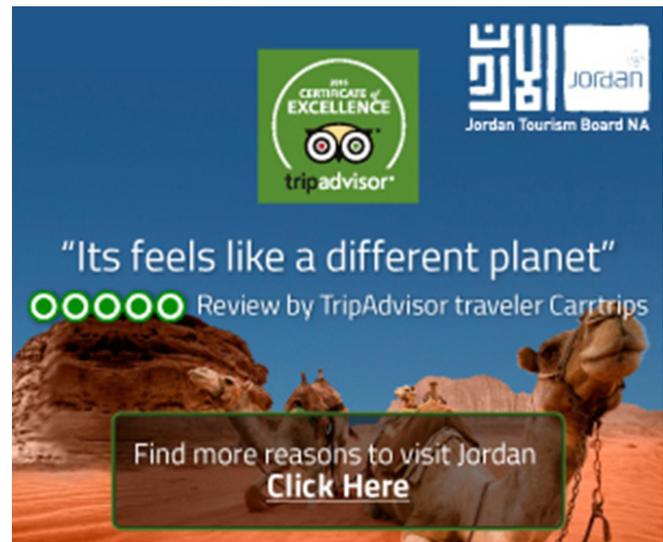
Instagram photos from hikers on a large LCD screen featured above their booth. It updated continuously in real-time, creating a moving mosaic of images from the trail. UGC has been so effective for the country that they have seen an all-time high in visitation. When a Canadian tourist was shot at a tourist site in 2016, the tourism board had many partners send them messages saying that they know this was an isolated incident. "Our 'ambassadors' replied to bad comments from people on our social accounts without us even asking them," says Abu Taleb.

CASE STUDY 2:

Bermuda & Big Data

While not geographically located in the Caribbean Sea, the British Territory of the Bermuda is part of the Caribbean Community and competes directly with many Caribbean tourism destinations, which offer similar sun and sand products. The Bermuda Tourism Authority was looking for ways to improve its product development and diversification. "If you get people to a destination and you are not delivering, that is not success. We are just the DMO; we don't own the delivery," says Erin Smith, Vice President of Research and Business Intelligence of the Bermuda Tourism Authority (BTA). Working with Resonance Consultancy, the DMO used TripAdvisor and other UGC to evaluate its current product offerings and product quality to better deliver on the brand promise.

When BTA conducted an initial Tourism Quality Index assessment with Resonance, the country was last in their competitive set when it came to culinary tourism experiences. While Bermuda excels in restaurant experiences from the consumers' perspective, there was no Bermuda food or drink information easily accessible to consumers online. The DMO decided to invest in culinary tourism to both support its culinary traditions and to keep pace with increased interest in food tourism.

The DMO's product and experiences team focused on educating the tourism industry stakeholders and entrepreneurs on this gap in tourism experiences through public information sessions. They also adapted an existing investment fund to give priority to new businesses that sought to fill the culinary tourism gap.

Following the public information sessions and entrepreneurship program, several new food tours became available to visitors.

- Wild Herbs & Plants of Bermuda Foraging Tour

- Long Story Short Bike and Food Experience

- Variety of culinary experiences via the Winnow app (and bookable in visitor centers)

- Wadson's Farm farm-to-table experience with local hotels

- Bermuda Food Tours

- Take A Bite out of Bermuda Food Tours

At the same time, BTA started integrating culinary tourism and Bermuda-specific cuisine into its existing activities. During the established restaurant weeks, the BTA encouraged local restaurants to feature Bermuda-inspired menus and post on social media. BTA hosted familiarization tours, press trips, events, and groups which featured farm-to-table and sea-to-table offerings. BTA also created local fish sandwich competitions and a new food truck festival. The BTA believes the island is far more now competitive in this space than it was four years ago when BTA was founded.[96] Strong reviews from consumers helped accelerate interest in expanded product choices.

South Africa Tourism's Influencer Marketing Campaign

South Africa Tourism (SAT) launched an Influencer and User-Generated Content campaign to raise awareness of their cultural tourism product and to honor of the 25th anniversary of Nelson Mandela's release from prison.

In the campaign, entitled #MeetSouthAfrica, SAT worked with four U.S. influencers who shared their South African travel experiences on their social channels. The content was also shared on SAT's social accounts; it increased travelers' use of #MeetSouthAfrica. The campaign resulted in:

- The 139 shared photos, generating over 15.4 million impressions (views) and 178K engagements (likes)

- The number of followers of the @VisitSouthAfrica Instagram account grew by over 30 percent and engagement on the account rose over 54 percent

- Globally, during the two-week duration of the tour, the #MeetSouthAfrica hashtag generated over 26 million impressions (7 million more impressions per week than average)

- Influencers published 10 blog posts for a combined readership of over 60,000

- There were 528,486 cross-platform video views

The campaign inspired the creation of more UGC content and at press time, #MeetSouthAfrica was used in more than 310,000 Instagram posts. Sparkloft, South Africa Tourism's U.S. Social Agency, continues to work with SAT on influencers and launched a new digital campaign with influencers called #WOWSouthAfrica.[97]

CASE STUDY 4:

Tourism Ireland

Fáilte Ireland, Ireland's National Tourism Development Authority, sought to boost international tourism to western Ireland following recession and decreased international visitation. Tourism has long been an important part of the economy in the west of Ireland and accommodation and hospitality sectors are key drivers of employment. The region's rugged landscape, traditional culture and heritage, towns and villages with character and friendly people are at the core of the region's appeal, but the destination is quite fragmented and tourism promotion didn't extend beyond administrative boundaries.[98]

To boost international tourism and local cooperation, tourism authorities, in partnership with local and regional governments, launched in 2014 a coastal tourism route called Wild Atlantic Way. The 2,500 km coastal tourism route connects the cities in western Ireland through maps, signposting, and a distinct brand. Fáilte Ireland worked with Tourism Ireland, the organization dedicated to marketing the entire island of Ireland overseas, and many other organizations in order to promote the new route.

Tourism Ireland partnered with TripAdvisor to reach British and other international consumers with a set of customer videos featuring key sites along the route. TripAdvisor overlaid each point of interest with a user review and overall bubble rating from the website as pictured below. The user rating and reviews leverage the power of the TripAdvisor brand and the general trust and dependence users have on its review content to

guide and shape their travels. TripAdvisor delivered this video campaign to its users via various products including a targeted advertising media player within the core site experience of TripAdvisor, as well as a video advertising product on Facebook and Instagram to capture users outside of travel research and to push them towards research and booking behavior. Users who clicked on the advertisement after watching the video were driven to TripAdvisor pages to start their research.

The video content was very well received with a very high completion rate, a click-through rate many times higher than a standard campaign's benchmark performance, and a lively series of positive replies and 'likes' on Facebook and Instagram. Just one year after the initial campaign launch, Ireland saw an 11 percent increase in international visitors who brought €4.2 million to the local economy.[99] The initiative was so successful Fáilte Ireland is launching another such brand for the Midlands under the Hidden Heartlands brand.[100]


SKELLIG MICHAEL, CO. KERRY
"Absolutely spectacular piece of the world"
REVIEWED BY RONAN

UGC Activation with Tourisme Montreal

In 2013, Tourisme Montréal, the DMO for the city of Montreal, Canada, launched the "Montreal Moments" campaign and corresponding #MTLMOMENTS hashtag. The marketing campaign asks visitors and residents to be "destination ambassadors" by using the hashtag #MTLMOMENTS when they post on social media outlets about their time in Montreal.[101]
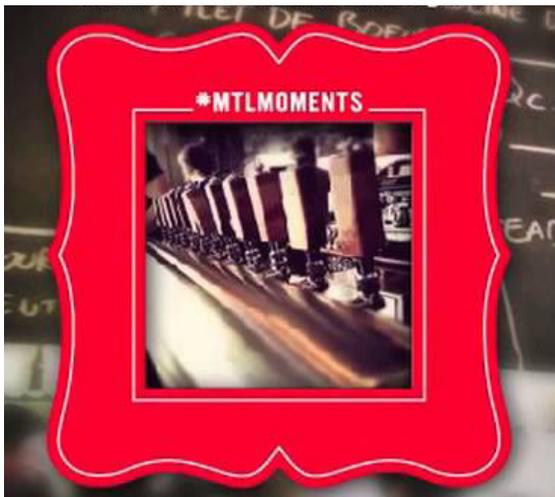
Source: Tourisme Montreal

To generate buzz and awareness, the DMO mailed postcard-size cutout frames to local business and media influencers. They also worked with the city to place large permanent frames in key points around the city so people could pose and take photos of themselves through the frames. The frames prominently featured ##MTLMOMENTS on it to encourage locals and visitors to share their experiences online using the campaign hashtag.[102] Tourisme Montreal used the campaign, hashtag, and its content to create a multichannel marketing campaign featuring spontaneous moments from residents and visitors to showcase the real Montreal.

This campaign was highly successful and won many awards, including Canada's prestigious digital marketing awards Boomerang. In its first year, over 30,000 #MTLMOMENTS were shared via Instagram, Facebook, and Twitter. Visitor traffic to the DMO's responsive website has increased by 22 percent and Tourisme Montréal's YouTube channel recorded close to two million visits.

In addition to its marketing success, the content of the campaign changed the way the destination marketed itself going forward. "#MTLMOMENTS marks a turning point in the way Tourisme Montréal presents the city to visitors. Rather than imposing a vision of what we think they should see, we let people do the talking and show us their Montréal. We've reached out to employees, members, and Montrealers to share their love for their city. Their good moments are the best way to convince tourists to come visit," former Emmanuelle Legault, Vice President of Marketing at Tourisme Montréal, said in a press release.[103]

The success of this campaign fed into the development of the DMO's new brand focusing on moments and various consumer experiences.[104] The campaign and hashtag is still in use today has more 1.5 million tags on Instagram. The DMO also features it on their website www.mtl.org/en/explore/mtlmoments.

Scotland's Instagram Travel Agency

VisitScotland has kept abreast of consumer trends to reach new audiences. The DMO found that nearly two-thirds of Instagram users use the app to plan their vacations.[105] According to a survey conducted by Stackla, 97 percent of millennials say they would share a positive travel experience on social media, and 57 percent of millennials have made travel plans based on social media images or videos they saw a friend post.[106]

#Scotspirit Instagram Travel Agency, London
© VisitScotland/Mikael Buck

VisitScotland leveraged these and other insights to create an innovative marketing campaign inspired by UGC to reach millennials in London. It tapped into millennials' reliance on UGC and their desire for authentic travel experiences. In October 2017, the DMO created a pop-up travel agency using user-generated content tagged with the country's hashtag #ScotSpirit instead of the traditional brochures and catalogues.

During the week of the temporary pop-up Instagram travel agency, VisitScotland saw a spike in the number of Instagram followers. The campaign also generated 192 pieces of media coverage including such high-profile media outlets as the BBC, *Metro and London Evening Standard*, furthering the campaign's reach. VisitScotland has seen the volume of overnight visits by London millennial audiences to Scotland grow by 34 percent from 2013 to 2016 following the UGC campaign.[107]

Laura Mitchell
Assistant PR Manager at VisitScotland:

"We know that 92 percent of consumers trust earned media above all other advertising so it was important for us to use real people's meIpsos MORIes and experiences of being in Scotland in a really visual and creative way (...) Stackla helps us curate UGC and allows us to segment that content by themes like region, food and drinks, or history and heritage. This helps to showcase a breadth of regions and the wealth of things to see and do in Scotland for our audiences to see." [108]

UGC drives ROI in Hamilton Island

Hamilton Island, Great Barrier reef, in Australia has used UGC to grow their tourism. "We've been very lucky that visitors have always wanted to share and interact with us," says Aida Merdovic, Director of Online for Hamilton Island in an interview with Stackla. Merdovic reports seeing about 4,500 hashtagged Instagram posts about the island each month.

The tourism organization is integrating user-generated content throughout its communications. Hamilton Island spotlights guest perspectives, allowing their voices — and authentic travel content — to be the focal point in brand messaging throughout the path to purchase.

Hamilton Island decided to bring UGC to the forefront of their newly redesigned website. Curated from #HamiltonIsland social hub powered by Stackla, the site features posts from visitors and offers potential visitors a real-time view of island, which they can filter by activities, accommodation, events, and more.

The benefits of UGC has spread to offline channels and has inspired employees as well. Hamilton Island features unfiltered social content on screens in their Sydney reservations center to remind the team of the experience they are selling.[109]

Aida Merdovic
Director of Online for Hamilton Island:
In an interview with *Stackla*

"We nearly doubled our ROI for social in the month following the launch of our new website. We have seen the growth rate of guest engagement and follower numbers on social media almost double week on week across all platforms as well."

CASE STUDY 8:

Crisis Communications in Puerto Rico

The U.S. Island Territory of Puerto Rico was hit very heavily after hurricanes Maria and Irma in September 2017. News spread about the impact of these natural disasters, the island's loss of power and the state of affairs. As Puerto Rico worked to recover, there was little accurate information about the current condition of the island and its readiness for tourism. "The island has been officially open for tourism since December," Carla Campos, acting executive director of the Puerto Rico Tourism Company (PRTC) said in an interview with CNN. "San Juan Port started welcoming leisure cruises just two weeks after Hurricane María and areas around the island like Culebra, Ponce, Mayagüez, Cabo Rojo, Rincón, Vieques are also back in business." [110] Despite roughly 80 percent of Puerto Rico's hotels and restaurants being back in business by February 2018, Puerto Rico still appeared to be closed for business in the eyes of the consumer.[111]

PRTC worked with TripAdvisor to correct misconceptions, assess product quality, and leverage UGC to showcase real tourism experiences. TripAdvisor provided Premium Destination Partnerships for hurricane-impacted destinations to provide better market access and enhanced features.

Puerto Rico updated the destination's post-hurricane TripAdvisor presence by:

- Uploading photos and videos with the date on them to show that they had been shot post-hurricane Irma;

- Creating articles and content collections to highlight conditions on the ground; and

- Mobilizing locals and guests to share reviews on lodging, restaurants, attractions etc.

The DMO also worked with TripAdvisor to leverage the TripAdvisor travel community. They monitored TripAdvisor forums for questions or posts and responded with advice and information to correct misperceptions on conditions. PRTC also leveraged recent UGC to showcase current experiences through the traveler reviews. Puerto Rico tourism has also used UGC in many of past campaigns and it is featured prominently on their website seepuertorico.com. The DMO allowed the current experiences of the travelers to tell the destination's story online. Puerto Rico curated content that showcased the best things to see and do in Puerto Rico now. All of this activity had promising early results: consumers spent 30,000 hours engaging with Puerto Rico content and viewed 3,250 photos and videos.[112]

Tourism SMEs Competitiveness in Indonesia

With its vast cultural resources, beautiful natural setting and proximity to key tourism source markets, Indonesia has the potential to grow their tourism sector. The WBG is working with the Government of Indonesia to improve the competitiveness of the tourism sector in the largest-ever WBG tourism project. Research showed that tourism SMEs in Indonesia faced two key challenges: relatively low access to the market; and a need to improve the quality of the services they provide. To address these challenges, the project will enable the Ministry of Tourism to assist local firms in selected locations by using data obtained from UGC and the TripAdvisor website to develop a series of workshops that will improve these firms' online presence and engagement — critical for any tourism firm to remain competitive and to maximize its access to markets.

In addition, the data from UGC will be used by the Ministry to monitor and evaluate service and quality standards of tourism firms, identify areas needing improvement in each destination, and tailor practical training to enable tourism firms to meet higher overall standards.

The WBG is working closely with TripAdvisor and the Ministry of Tourism to analyze the present performance of Tourism SMEs in each priority destinations. The data is informing the design of and type of interventions needed, as well as establishing the baselines and targets for future program monitoring. The program will be mobilized during FY19. It will be the first time that the impact of the World Bank project has been monitored and assessed over time using UGC and if successful could be used in many other similar projects elsewhere.

Conclusions & Next Steps

Conclusions & Next Steps

The world of digital tourism marketing is fast evolving around user-generated content. Those destinations and businesses that are seizing this opportunity are not always the ones spending the most on marketing. There is now an opportunity for even low-income destinations to make a significant difference through smart digital campaigns based on UGC. Case studies reveal that destinations that tap into the power of UGC to tell their story have managed to increase awareness of their product. Jordan successfully relies on UGC to tell its story of a secure, compelling destination to decrease consumer anxiety about traveling to the Middle East. Puerto Rico leveraged UGC to communicate that the island was open for business after natural disasters. Bermuda used data collected from UGC to stay at pace with consumer demand and launch a new culinary tourism product. Indonesia will leverage UGC and its platforms for data and to train and monitor the success of their tourism SMEs.

This report has provided readers with a primer on UGC and hopefully sparked increased interest to learn more. It should be clear now that businesses and destinations should take advantage of these trends, and what tools and techniques are available to leverage UGC for development impacts. Low-income tourism destinations can also leverage the data and insights gleaned from UGC to improve destination management, product offerings, industry insights and marketing. UGC and the data it yields can provide less costly alternatives to traditional tourism marketing like trade fairs and mass-media campaigns and costly and time-intensive surveys.

However, there is much still to learn about how to use UGC for development impact and to further level the playing field for low-income destinations. The space shows exciting potential as demonstrated by Bermuda's creative use of UGC and the design of interventions from the WBG Indonesia project. However, there is little research on this subject beyond its use for marketing and few available case studies, but there is room for innovation and insights learned through doing.

The potential applications of UGC are large but require more research. Some key areas to explore include:

UGC provides new forms of data and ways to analyze qualitative visitor information: UGC reveals travelers' behavior in real time. This holds significant potential both in terms of destinations avoiding the problems that come with overcrowding, as well as building new opportunities to distribute the impact and benefits of tourism across a wider geographic and economic area.

UGC training may provide an opportunity to fast track access to market for tourism destinations and tourism SMEs, many of which are women-owned and managed

UGC may have a role in crisis response management: UGC yields real-time data, which could deliver 'live' data to national authorities dealing with the wake of a crisis. This would be delivered in tandem with more proactive content about how past crises have been mitigated.

UGC may provide a reliable tool to monitor the impact of WBG investments: The collaboration between WBG and TripAdvisor may provide opportunities to track the "before, during, and after" of, for example, capacity-building or product development activities on businesses and destinations.

UGC may help destinations better manage visitor numbers and movement: UGC reveals travelers' behavior in real-time. This holds significant potential both in terms of helping destinations to avoid the problems that come with overcrowding, as well as offering innovative ways to distribute the impact and benefits of tourism across a wider geographic and economic area.

This is the first WBG report on UGC and tourism, and it is just a starting point of the possibilities of UGC to help make travel more inclusive and sustainable. Next steps may include: the development of UGC diagnostic assessments, the development of destination and business training webinars and information sessions; the design of a UGC and destination dashboard; and an investigation of ways to use UGC to assess investment impact. The WBG is grateful for the partnership with TripAdvisor and looks forward to future opportunities to operationalize the results of this initial work for more inclusive and sustainable tourism.

Questions and expressions of interest can be sent to: tourism@worldbankgroup.com.

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