



**New Media Services**  
*Ratings and Recommendations Websites*  
*in the Travel and Tourism Industry*

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## Contents

<b>EXECUTIVE SUMMARY</b> .....	<b>5</b>
<b>DESTINATION AUSTRALIA</b> .....	<b>7</b>
<b>QUEENSLAND GOVERNMENT TOURISM STRATEGY</b> .....	<b>9</b>
<b>TOURISM THROUGH PERSONAL EXPERIENCE</b> .....	<b>10</b>
CONTROVERSIES OVER THE IMPARTIALITY AND RELIABILITY OF INFORMATION.....	11
<b>KEY TRAVEL RATINGS AND RECOMMENDATIONS SITES</b> .....	<b>12</b>
THE MARKET LEADER: <i>TRIPADVISOR.COM</i> .....	17
SECOND PLACE: <i>IGOUGO.COM</i> .....	18
CROWDSOURCING GUIDEBOOKS: <i>ZAGAT.COM</i> .....	19
REVAMPED OLD MEDIA: LONELY PLANET'S <i>THORN TREE</i> .....	20
ADDED VALUE: <i>STAYZ.COM.AU</i> .....	21
NICHE TRAVEL: <i>BIGVILLAGE.COM.AU</i> .....	22
SMARTER FREQUENT TRAVELLERS: <i>DOPPLR.COM</i> .....	23
EVERYDAY MOBILE SOCIAL GAMING: <i>FOURSQUARE.COM</i> .....	24
PROFESSIONAL REVIEWS: <i>SUITE101.COM</i> .....	25
OUT OF COMPETITION: <i>YELP.COM</i> .....	26
<b>CONCLUSIONS</b> .....	<b>27</b>
<b>REFERENCES</b> .....	<b>29</b>
<b>ABOUT THE AUTHORS</b> .....	<b>31</b>
BARBARA GLIGORIJEVIC .....	31
DR AXEL BRUNS.....	32
<b>ABOUT US</b> .....	<b>33</b>
SMART SERVICES CRC .....	33
RESEARCH.....	33
SERVICES INNOVATION FOUNDRY.....	33

## Executive Summary

The travel and hospitality industry is one which relies especially crucially on word of mouth, both at the level of overall destinations (Australia, Queensland, Brisbane) and at the level of travellers' individual choices of hotels, restaurants, sights during their trips. The provision of such word-of-mouth information has been revolutionised over the past decade by the rise of community-based Websites which allow their users to share information about their past and future trips and advise one another on what to do or what to avoid during their travels. Indeed, the impact of such user-generated reviews, ratings, and recommendations sites has been such that established commercial travel advisory publishers such as Lonely Planet have experienced a pronounced downturn in sales – unless they have managed to develop their own ways of incorporating user feedback and contributions into their publications.

This report examines the overall significance of ratings and recommendation sites to the travel industry, and explores the community, structural, and business models of a selection of relevant ratings and recommendations sites. We identify a range of approaches which are appropriate to the respective target markets and business aims of these organisations, and conclude that there remain significant opportunities for further operators especially if they aim to cater for communities which are not yet appropriately served by specific existing sites. Additionally, we also point to the increasing importance of connecting stand-alone ratings and recommendations sites with general social media spaces like *Facebook*, *Twitter*, and *LinkedIn*, and of providing mobile interfaces which enable users to provide updates and ratings directly from the locations they happen to be visiting.

In this report, we profile the following sites:

- *TripAdvisor*, the international market leader for travel ratings and recommendations sites, with a membership of some 11 million users;
- *IgoUgo*, the other leading site in this field, which aims to distinguish itself from the market leader by emphasising the quality of its content;
- *Zagat*, a long-established publisher of restaurant guides which has translated its crowdsourcing model from the offline to the online world;
- Lonely Planet's *Thorn Tree* site, which attempts to respond to the rise of these travel communities by similarly harnessing user-generated content;
- *Stayz*, which attempts to enhance its accommodation search and booking services by incorporating ratings and reviews functionality; and
- *BigVillage*, an Australian-based site attempting to cater for a particularly discerning niche of travellers;
- *Dopplr*, which connects travel and social networking in a bid to pursue the lucrative market of frequent and business travellers;
- *Foursquare*, which builds on its mobile application to generate a steady stream of 'check-ins' and recommendations for hospitality and other services around the world;
- *Suite 101*, which uses a revenue-sharing model to encourage freelance writers to contribute travel writing (amongst other genres of writing);
- *Yelp*, the global leader in general user-generated product review and recommendation services.

In combination, these profiles provide an overview of current developments in the travel ratings and recommendations space (and beyond), and offer an outlook for further possibilities. While no doubt affected by the global financial downturn and the reduction in travel that it has caused, travel ratings and recommendations remain important – perhaps even more so if a reduction in disposable income has resulted in consumers becoming more critical and discerning.

The aggregated word of mouth from many tens of thousands of travellers which these sites provide certainly has a substantial influence on their users. Using these sites to research travel options has now become an activity which has spread well beyond the digirati. The same is true also for many other consumer industries, especially where there is a significant variety of different products available – and so, this report may also be read as a case study whose findings are able to be translated, *mutatis mutandis*, to purchasing decisions from household goods through consumer electronics to automobiles.

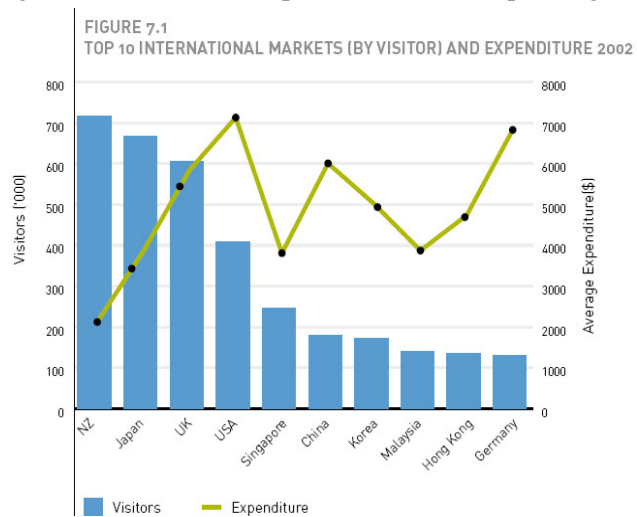
## Destination Australia

The World Tourism Organisation forecasts that by 2020 the total number of international travels worldwide per annum will rise to 1.6 billion. By 2012 it is expected that tourism export earnings will amount to around 27 billion dollars. Australia currently holds less than a 1% share of the world's tourism market, with 4.8 million international visitors (Australian Government, 2005) per annum. By 2012 it is expected that the number of international visitors will increase to 7.5 million tourists (Tourism Forecasting Council, 2003).

By comparison, domestic tourism accounts for over three quarters of tourism consumption in Australia. With the current growth rate of 0.5% per annum it is expected that by 2012 the number of overnight stays by domestic visitors will rise to 314 million (Tourism Forecasting Council, 2003 cited in Australian Government, 2005).

The expenditure per night ranges from \$95 for an average tourist to \$159 for international business visitors. In 2002 the average expenditure by foreign tourists was \$4748 per visit, with the spending led by visitors from China (\$6006), Germany (\$6826), and the United States (\$7127), while backpackers spend \$5319 per visit, but understandably over a longer period of time (Australian Government, 2005).

In 2009, the number of foreign visitors remained the same relative to the previous year, at 5.6 million tourists. During January 2010, there were 456,000 visitors mainly from New Zealand, Europe, North America, North Asia and Southeast Asia (See figure 2). In February 2010 Australia had 558,300 international visitors, an increase of 11% compared to February 2009 (Tourism Australia, 2010).



**Figure 1: Foreign visitors' expenditure by country of origin**  
(Source: Bureau of Tourism Research, cited in Australian Government, 2005)

There is a noticeable change from 2008 to 2009, with declining numbers of tourists coming from Japan (-20%), Korea (-12%), South Africa (-12%), Netherlands (-8%), Ireland (-8%), China (-7%), Israel (-5%), Italy (-4%), Sweden, Germany and New Zealand (-1% each). Increasing numbers of tourists compared to 2008 originated from Malaysia (21%), Taiwan (18%), Indonesia (17%), France (11%), Switzerland (10%), the USA (8%), and the Middle East and North Africa (6%).

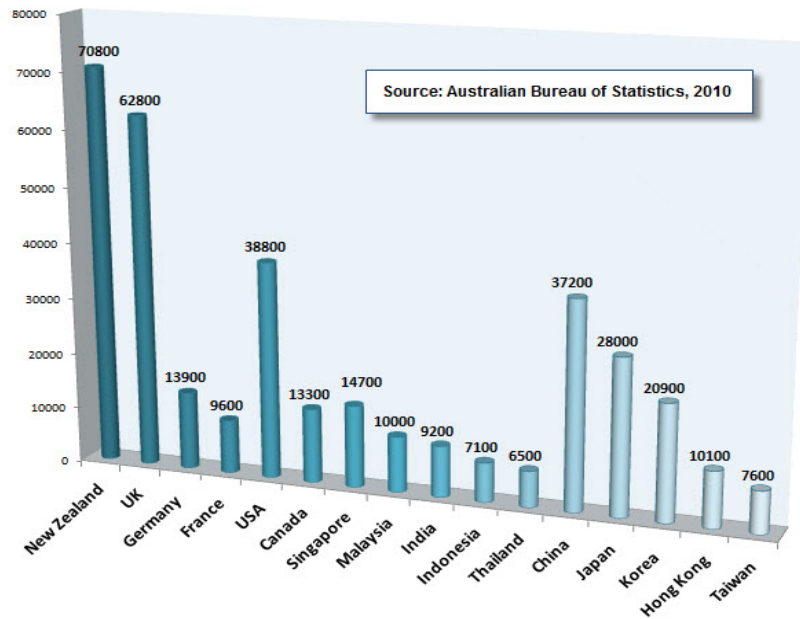


Figure 2: Arrival of tourists to Australia by country of origin, January 2010 (Source: Australian Bureau of Statistics cited in Tourism Australia, 2010)

To boost inbound tourism, the Australian Tourist Commission developed the Website *Australia.com*. This site serves as a marketing tool for the Australian Tourist Commission, providing information about Australian history, culture, arts, and other interesting facts. In order to attract and inform potential visitors to Australia, a list of destinations and events is helping tourists plan and organise their trips. A list of relevant Australian tourist websites is listed in figure 4.

As part of a new marketing campaign, Tourism Australia will deploy social media as a major channel of communication with the international travel community by launching a new Website on 15 April 2010. The tagline of the campaign is “There is nothing like Australia”, and the Website *www.nothinglikeaustralia.com* will allow average Australians to tell their stories about the country and suggest interesting places to be visited by overseas travellers. The aim of the campaign is to highlight the variety of locations in Australia rather than to promote Australia as one travel destination.

There is also a range of commercial Websites which provide tools for travellers to plan their trips, book accommodation or transport, and learn about Australia as well as specific states and territories (fig. 5).



Figure 3: Tourism Australia Website

<b>Official sites - Australia</b>
<a href="http://www.australia.com">www.australia.com</a>
<a href="http://www.tourism.australia.com">www.tourism.australia.com</a>
<a href="http://www.businessevents.australia.com">www.businessevents.australia.com</a>
<a href="http://www.tradeevents.australia.com">www.tradeevents.australia.com</a>
<a href="http://www.tra.australia.com">www.tra.australia.com</a>
<a href="http://www.indigenoustourism.australia.com">www.indigenoustourism.australia.com</a>
<b>Official sites - Queensland</b>
<a href="http://www.destinationqueensland.com">www.destinationqueensland.com</a>
<a href="http://www.queenslandholidays.com.au">www.queenslandholidays.com.au</a>
<a href="http://www.tq.com.au">www.tq.com.au</a>
<a href="http://www.media.australia.com">www.media.australia.com</a>

Figure 4: Official Tourism Australia and Tourism Queensland Websites

Commercial sites - Australia	Commercial sites - Australia
<a href="http://www.about-australia.com">www.about-australia.com</a>	<a href="http://www.oztalk.co.uk">www.oztalk.co.uk</a>
<a href="http://www.asiarooms.com">www.asiarooms.com</a>	<a href="http://www.touristaustralia.com.au">www.touristaustralia.com.au</a>
<a href="http://www.aussie-info.com">www.aussie-info.com</a>	<a href="http://www.oztourism.com.au">www.oztourism.com.au</a>
<a href="http://www.australiatripguide.com">www.australiatripguide.com</a>	Commercial sites - Queensland
<a href="http://www.austrtravel.com.au">www.austrtravel.com.au</a>	<a href="http://www.queensland.com">www.queensland.com</a>
<a href="http://www.destination-australia.net">www.destination-australia.net</a>	<a href="http://www.queensland-australia.com">www.queensland-australia.com</a>
<a href="http://www.discoveraustralia.com.au">www.discoveraustralia.com.au</a>	<a href="http://www.wottodo.com.au">www.wottodo.com.au</a>
<a href="http://www.justclickaustralia.com">www.justclickaustralia.com</a>	<a href="http://www.sunzine.net">www.sunzine.net</a>

Figure 5: Commercial Australian and Queensland Websites

## Queensland Government Tourism Strategy

Australian tourism advertising is also strongly driven by individual states' campaigns, which are in competition with one another. The Queensland State Government's tourism strategy, for example, aims for Queensland to become Australia's leading tourist destination by 2016, by offering visitors unique "experiences that are distinctly Queensland". One of the major tools in achieving this goal is to "increase focus on digital communication as a key marketing platform" (Queensland Government, 2007, p.1). Building on the success of the 1998 TV commercial "Where else but Queensland", in 2007 Brand Queensland's television commercial campaign was launched in the markets of Sydney and Melbourne as part of an engagement strategy for interstate markets; Sydney and Melbourne are Queensland's key domestic markets. Marketing objectives of this campaign were to:

- Ensure Queensland is the first destination of choice when considering a holiday;
- Ensure Queensland's core brand values are communicated to target markets;
- Strongly associate Queensland with pleasure. (Tourism Queensland, 2007)

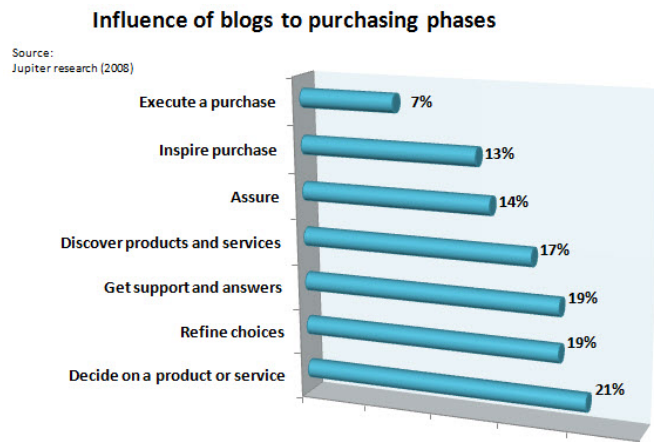
Although domestic consumers' awareness of Queensland as a holiday destination is high, this campaign was aspiring to re-engage and stimulate the audience to think of Queensland as the ultimate travel destination. Holidaying in Queensland, compared with international destinations, is offering a higher degree of travelling flexibility at a lower cost. The targeted audience segments were:

- Primary market: mid-life households (head of household aged 45-64), no children under 16, with an income of \$80,000+;
- Secondary market: mid-life families (head of household 45-64) with children under 16, with an income of \$60,000+.

Queensland is commonly thought of by consumers as a singular destination associated with beach culture, natural wonders, the Great Barrier Reef, and a casual lifestyle. This perception, although delivering to consumers a sense of relaxation, rejuvenation, and being carefree, is somewhat limiting the choice of local destinations. Queensland provides more than beaches and surfing. It offers a unique sense of outdoor culture in outback areas and rainforests, while many small inland settlements are still practicing an old-fashioned Australian farming lifestyle. The road infrastructure is providing safe travel by car, with a possibility to stop and enjoy the scenery of the rural landscape or camp along the way. Car-based tourism is also bringing inbound tourists to remote areas, and is a very important source of income for local communities. In Queensland, the tourist industry is earning over \$8.4 billion and directly employs 103,000 staff (Boyle, 2007).

## Tourism through Personal Experience

Classified as a service industry, the tourism industry is a complex combination of infrastructure and physical resources providing personal experience to travellers, in direct interaction between consumers and service providers. According to Cooper and Hall (2008), stories deriving from personal experience, posted on travel blogs and as product reviews on Websites, play an increasingly important role in consumers’ decision-making processes. Recent studies are showing a growing reliance on online sources, indicating that 82% of consumers conduct their research online prior to travelling. Over 80% of those consumers are confirming that “online word of mouth posts influence their decision” (Opinion Research Corporation cited in Australian Tourism Data Warehouse, p.2).



**Figure 6: Influence of blogs on customers in various purchasing phases (Source: Jupiter research, 2008)**

A 2008 study by Jupiter Research has shown that blogs influence consumer purchases more than social networks, while 50% of blog readers find blogs a useful source of purchase information. The study points out that the most popular categories of information for which blog readers search are technology-related products (31%), media and entertainment (15%), games, toys and/or sporting goods (14%), travel (12%), automotive products (11%), and health products (10%). Significant numbers of respondents (52%) stated that the content of blogs had an influence on them at a critical moment while deciding to make a purchase: blogs influenced decisions on a product or service (21%), helped refine purchase choices (19%), enabled customers to get support and answers (19%), helped them discover products and services (17%), assured them in their decision (14%), inspired purchases (13%), and enabled them to execute a purchase (7%).

Comments on blogs are not only inspiring consumers to act, but also build their trust. Further, the level of trust towards advertising among blog readers is very high: 25% trust ads on a blog they read, 25% trust paid search links, while 19% trust ads on social networking sites. 40% of blog readers, and 50% of frequent blog readers, are acting upon viewing an ad on a blog (Jupiter Research, 2008).

Killion (2009) points out that the growth of customer-driven services in tourism and travel is propelled by Web 2.0 environments which provide an ability to share “travel experiences and memoirs through individualised blogs” and thus influence others in their decision-making processes. He questions the future of intermediaries such as travel agents, which used to be positioned as the major link between commercial service providers and consumers: if intermediaries are removed as a result of the move towards online information and service provision, producers and suppliers are now directly responsible for the promotion and delivery of their services to customers. Killion warns that often, small tourism operators are unable to carry out such tasks, losing their market share to larger companies.

At the same time, although many customers search the Web for travel-related information, they may still turn to their travel agents for advice or assistance if they are unhappy with Web-based service providers (Ellin, 2007). A recent trend of customers returning to the more personalised services that travel agents offer has forced online booking companies to improve their customer services and expand the quality of the online information and content they offer – for example by adding better ratings and reviews functionality or by providing more immersive information through photos, maps and video tours.

## Controversies over the Impartiality and Reliability of Information

Most of the companies that currently operate as major travel sites or booking agents had to develop a comprehensive range of online services in order to generate a constant stream of users. Some of these companies have adopted a commercial business model with online booking and advertising as a main revenue stream, some provide only the necessary information for travellers to plan and arrange their trips, while others have evolved into offering user-generated reviews and ratings of hotels, restaurants and travel destinations, building their business models on their ability to attract a large and active community of committed users. This increased reliance of commercial operators on the participation of users as content-creating communities also raises questions about the potential clash of business and community interests and values, however (cf. Bruns, 2009).

For example, recently there have been allegations that the reviews site *Yelp* is using unconventional sales methods, pursuing companies to buy advertising on the site in exchange for the removal of negative reviews that had been posted earlier by community members (Wauters, 2010). *Yelp* management has refuted these allegations of “extortion” and claimed that all of the content on the site is trustworthy, pointing to the fact that many companies that advertise on the Website receive positive as well as negative reviews. It remains to be seen how the Los Angeles Federal Court will rule in a current class action lawsuit against *Yelp* for “unfair business practices”, and how the community of users will react to the outcome of this controversy. At any rate, however, losing the appearance of objectivity and impartiality through a vigorous pursuit of profitability may cause community disillusionment about the company’s motivations and lead to an exodus of community members. Any perception of unethical behaviour by companies running rating and recommendations sites – however unjustified it may be – will undoubtedly result in increasing levels of mistrust amongst users.

Sites like *Tripadvisor*, which builds on user-generated travel reviews and recommendations, have also been criticised for their lack of screening procedures, allowing the posting of fraudulent reviews and traveller experience reports that fail to provide any supporting evidence (McGrath and Keenan, 2007). Such activities could be damaging for the service providers whose products are reviewed, of course. At the same time, such concerns may be overstated: although it was initially expected that the removal of barriers for users to post reviews and recommendations would result in a greater volume of negative feedback, the opposite can be observed; sharing positive travel experiences has become a more common practice on the site than criticising sub-standard operators. The company has also conceded that it would be possible for crafty entrepreneurs to influence discussions in *Tripadvisor*’s discussion fora or reviews sections, but also notes that the “sheer volume of offerings and the growing sophistication of Internet travel site users mitigates the problem” (Sharkey, 2008). A concerted action aimed at raising one’s ratings on a travel site may well constitute more effort than it would be worth – and would have to be repeated over and over for each of the major travel recommendation sites.

One of the pioneers in user-generated travel guide information, *Zagat.com*, whose core business continues to be driven by the sales of over 5.5 million print pocket guides for restaurants, hotels and

other services in 2009, has taken an aggressive approach to expanding its online business. The unique selling proposition of the company's products is that every comment is edited and synthesised before publishing, making it more concise and structured for readers. Founder Tim Zagat emphasises that the difference between his company's online reviews and those of major players like *TripAdvisor* and *IgoUgo* is in the level of filtering and editing of content on his site, allowing it to be presented in a very condensed form and in tables addressing categories such as quality, service, price, etc. (cited in Sharkey, 2008). Other user review sites, such as the generic products and services review site *Yelp*, display comments in full text and for free; *Zagat*, on the other hand, provides free access only to generic user reviews, but charges access fees for its professionally edited user reviews and ratings themselves on a 30-day or annual subscription base. *Zagat* does collect user-generated reviews of restaurants and other services on its Website, but has no intention to cease its printed publications, finding that compact, printed guide books still have a very large market coverage even in spite of an escalating online competition.

Controversy about the quality of ratings and recommendations is not limited to Web-based ratings and recommendations services, however. In 2008, a discussion about the truthfulness of conventional tourist guidebooks was initiated by former Lonely Planet travel writer Thomas Kohnstamm, who admitted in his book *Do Travel Writers Go to Hell?* that guidebook writers are often overly creative in their use of various information sources for their research, and occasionally report on travel destinations which they have never visited in person. Kohnstamm admitted publicly that, while writing about Colombia for Lonely Planet, due to insufficient funding he never actually visited the country. Indeed, he claims that the use of alternative sources including tourism brochures, Web-based information, and local contacts is a common practice: "the fact is just that sometimes you can't always get to visit every place in person" (interview with BBC Radio 4's *Today* programme, cited in Siddique, 2008).

Travel guidebooks are also criticised for how outdated they might have become by the time they reach bookstores and readers, and critics question whether the subjective opinions expressed by travel writers may be misleading for the average traveller (Norum, 2008). The fate of generic guidebooks remains unclear in the context of the growing number of travel Websites providing travel information, reviews and recommendations, some with large online communities, and the increasing number of recreational travellers with laptops, mobile phones, and other Internet-enabled devices. Given the number of contributors and the variety of reviews which are now commonly available for the same subject (from hotels and destinations to tour operators and airlines), these sites may be seen to provide a more balanced assessment and more detailed information about travel options than any guidebook, and to cater more directly for the personal experience of the ordinary tourist.

## Key Travel Ratings and Recommendations Sites

The following section provides an overview of leading ratings and recommendations sites, outlining their central features and providing an overview of their approaches to engaging with their communities of users as content creators. We also examine a number of related sites which do not form part of the ratings and recommendations industry directly, but operate in related areas.

The set of Websites that are discussed here are chosen according to their business model, market share, size of their communities, market niche, type of services provided, and form of user-generated content aggregated. The line-up of sites documents a remarkably healthy and varied ecosystem of travel-related sites – some start-ups, some spun off from businesses publishing conventional print guidebooks – and points to the importance of user-generated ratings and recommendations in tourism

as well as in many other markets for consumer products and services. All have developed sizeable and active online as well as offline communities.

*TripAdvisor* is a market leader among ratings and recommendations sites in the travel and tourism industry, providing evaluations of travel and accommodation options throughout the world, and connecting to booking services through an affiliated company, Expedia. At 11 million users, its community is significantly larger than that of any other Website in this field. It relies heavily on booking deals and advertising revenues.

*IgoUgo*, although running a very similar model, is significantly smaller, with around 500,000 members. The site's user-generated content appears to be slightly more tightly controlled for quality, but this may also simply be a result of its substantially smaller contributor base. It does seem to provide more subjective feedback based on travellers' experiences with hotels and other destinations, beyond mere factual information. Similar to *TripAdvisor*, the site offers travel booking facilities through third-party services – including Expedia, the company affiliated with its main competitor *TripAdvisor*.

Beyond these Web-native operators, *Zagat* is a leading publisher initially of restaurant guidebooks which has long pursued a strategy of crowdsourcing (rather than relying on professional critics) to generate its content, and has successfully translated this approach to the online environment. Reviews coverage on the *Zagat* site has since expanded beyond restaurants to other travel and lifestyle venues, with a specific focus also on golf resorts; this material is also delivered in print form and through mobile applications.

By contrast, travel publisher Lonely Planet only recently developed its online community, *Thorn Tree*, which now claims to have reached one million members. This Website largely replicates the established publishing model: Lonely Planet's own authors are predominant online, describing and evaluating destinations, while user fora and blogs are a significantly more limited, but nonetheless important source of user-generated reviews and recommendations. Perhaps as a result, the size of the *Thorn Tree* community remains significantly smaller than that of the market leaders.

*Stayz* is one of the leading Australian Websites for holiday rental accommodation, with some 550,000 visitors per month. The Website acts as an intermediary between holidaymakers and independent accommodation providers, forwarding inquiries directly to the operators of B&Bs, holiday rentals, and similar forms of accommodation. It recognises different travelling needs and styles, classifying accommodation under 24 different types. While user-generated ratings and recommendations do not play a major part in this site, there is substantial potential for further development of such functionality here.

*BigVillage* is a Website which aims at a niche community of travelling enthusiasts: travellers (mainly from Australia to overseas destinations) who seek new and unconventional travel experiences. Consequently, although there are no official figures available about the size of its community, based on the number of posts and the frequency of contributions of user-generated content it appears to have a markedly smaller community than the more mainstream sites. Nonetheless, *BigVillage* highlights the fact that user-generated ratings and recommendations models may also be successfully targeted at specific non-mainstream communities.

*Dopplr* similarly addresses a niche community: it is aimed predominantly at frequent international travellers and plugs into their existing social networking tools (from professional networking site *LinkedIn* to general social networking platforms such as *Facebook*). The site allows users to share and

synchronise their travelling itineraries with one another, and organise meetings where itineraries overlap; additionally, it allows its users to rate and recommend local accommodation, restaurants, sights, in their destination cities. Its pursuit of the high-end market, makes it unlikely that the community will grow to a size that could challenge market leaders, but it may nonetheless constitute a highly lucrative market segment (and *Dopplr* already provides an e-store with merchandise aimed specifically at this group).

In addition to these relatively conventional travel ratings and recommendations sites, we also examine a number of more unusual models which provide insights into alternative approaches that new players in this market may wish to explore, or that could be incorporated as added functionality into existing platforms.

*Foursquare* has introduced new aspects of social media to the ratings and recommendations model, through its location-based Web and mobile applications. The concept builds on gaming principles, allowing members to gain points by ‘checking in’ to (and rating or recommending) the locations and businesses they use, and sharing those check-ins using social media channels. This also allows for location-based advertising, a model that shows the potential to become more widespread in the future. While *Foursquare* is intended for everyday use rather than specifically during travel, the ratings and recommendations provided by its 500,000 users are necessarily also a valuable source of local knowledge for travellers.

*Suite101* is included here as an innovative business model for sourcing travel writing (amongst many other writing genres) from a large community of professional freelance authors. In other words, it does not provide conventional user-generated travel ratings and recommendations, but nonetheless acts as a major source of travel information. *Suite101* constitutes a network of professional writers, contributing texts on a range of topic including travel writing. Available in German, French, and Spanish (with a total of 27 million visitors per month), the site’s business model is unusual as it provides royalties to its contributors if their stories have achieved a certain level of popularity.

Finally, as the world’s most successful site for user-generated ratings and recommendations for general business services, our portrait of *Yelp* provides an important point of comparison between the approaches presently taken by travel industry sites and those in other contexts. *Yelp* operates as a rating and recommendations site in several English-speaking countries, but continues to conduct most of its business in four major U.S. cities. It covers 22 different categories of business services, including ‘Hotels and Travel’, and with 25 million visitors per month and 3.3 million content contributors is a leading player amongst Websites that focus on the aggregation of user-generated ratings and recommendations.

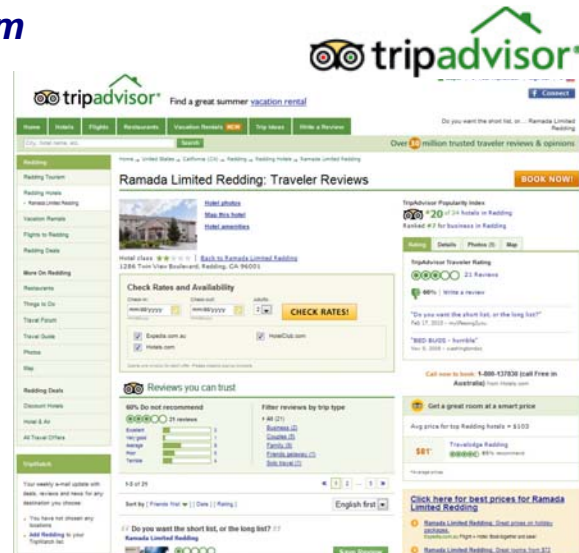
The following table provides an overview over the key characteristics of these Websites.

	<i>TripAdvisor</i>	<i>IgoUgo</i>	<i>Zagat</i>	<i>Thorn Tree</i>	<i>Stayz</i>
<i>Target audience</i>	<ul style="list-style-type: none"> <li>Family</li> <li>Business</li> <li>Luxury</li> </ul>	<ul style="list-style-type: none"> <li>Budget</li> <li>Adventure</li> </ul>	<ul style="list-style-type: none"> <li>Restaurant connoisseurs</li> <li>General travel and nightlife</li> <li>Golfers</li> </ul>	<ul style="list-style-type: none"> <li>Budget</li> <li>Adventure</li> </ul>	<ul style="list-style-type: none"> <li>Budget</li> <li>Family</li> <li>Domestic tourists</li> </ul>
<i>Coverage of reviews</i>	<ul style="list-style-type: none"> <li>Hotels</li> <li>Holiday rentals</li> <li>Flights</li> <li>Cruises</li> <li>Restaurants</li> <li>Sights</li> </ul>	<ul style="list-style-type: none"> <li>Flights</li> <li>Hotels</li> <li>Travel deals</li> <li>Car rental</li> <li>Cruises</li> <li>Sights</li> </ul>	<ul style="list-style-type: none"> <li>Restaurants</li> <li>Nightlife venues</li> <li>Hotels</li> <li>Golf resorts</li> </ul>	<ul style="list-style-type: none"> <li>Hotels</li> <li>Hostels and budget accommodation</li> <li>Flights</li> <li>Tours</li> <li>Car and rail travel</li> </ul>	<ul style="list-style-type: none"> <li>Non-hotel accommodation</li> </ul>
<i>Market and size</i>	<ul style="list-style-type: none"> <li>International</li> <li>11 million members</li> <li>400,000 locations</li> </ul>	<ul style="list-style-type: none"> <li>International</li> <li>500,000 members</li> <li>9,000 destinations</li> </ul>	<ul style="list-style-type: none"> <li>70 US and international cities</li> <li>250,000 contributors</li> </ul>	<ul style="list-style-type: none"> <li>International</li> <li>1million members</li> </ul>	<ul style="list-style-type: none"> <li>Australian</li> <li>1,200 destinations</li> <li>550,000 visitors per month</li> <li>25,000 properties listed</li> </ul>
<i>Style of reviews</i>	<ul style="list-style-type: none"> <li>5-point ratings scale</li> <li>Free-form reviews</li> <li>Registered members only</li> </ul>	<ul style="list-style-type: none"> <li>5-point ratings scale</li> <li>Free-form reviews</li> <li>Registered members only</li> </ul>	<ul style="list-style-type: none"> <li>30-point ratings scale</li> <li>Reviews edited before publishing</li> <li>Registered members only</li> </ul>	<ul style="list-style-type: none"> <li>Reviews by Lonely Planet authors</li> <li>Content from <i>Expedia</i></li> </ul>	<ul style="list-style-type: none"> <li>5 point ratings scale</li> <li>Feedback on 'guestbooks'</li> <li>Non-members may post reviews</li> <li>Business operators' responses</li> </ul>
<i>Bookings</i>	<ul style="list-style-type: none"> <li>Through Expedia</li> </ul>	<ul style="list-style-type: none"> <li>Various third-party services</li> </ul>	<ul style="list-style-type: none"> <li>Reservations only</li> </ul>	<ul style="list-style-type: none"> <li>Various third-party services</li> </ul>	<ul style="list-style-type: none"> <li>Facilitates contact with accommodation operators</li> </ul>
<i>User profiles</i>	<ul style="list-style-type: none"> <li>Screen name, age, gender, location</li> <li>Travel style</li> <li>Reasons for travelling</li> <li>Contribution stats</li> <li>Map of visited locations</li> </ul>	<ul style="list-style-type: none"> <li>Screen name, age, gender, location</li> <li>User information</li> <li>Travel journals and stories</li> <li>Contribution list</li> <li>Friends list</li> </ul>	<ul style="list-style-type: none"> <li>Screen name, age, location, interests</li> <li>Favourite restaurant, holiday destination,</li> <li>Member since</li> <li>Number of posts</li> <li>Other Websites</li> </ul>	<ul style="list-style-type: none"> <li>Screen name, location</li> <li>Participation stats (posts, replies, views)</li> </ul>	<ul style="list-style-type: none"> <li>No user profiles – reviews may be made anonymously or under a screen name</li> </ul>
<i>Venue listings</i>	<ul style="list-style-type: none"> <li>Address</li> <li>Star rating</li> <li>Official and members' photos</li> <li>Map location</li> <li>Amenities</li> <li>Virtual tour</li> </ul>	<ul style="list-style-type: none"> <li>Address</li> <li>Members' photos</li> <li>Map location</li> <li>Website link</li> </ul>	<ul style="list-style-type: none"> <li>Address</li> <li>Official photos</li> <li>Map location</li> <li>Amenities</li> <li>Working hours</li> <li>Dress code</li> <li>Opening date</li> </ul>	<ul style="list-style-type: none"> <li>Address</li> <li>Map location</li> <li><i>Lonely Planet</i> photos</li> </ul>	<ul style="list-style-type: none"> <li>Description</li> <li>Official photos</li> <li>Facilities</li> <li>Location</li> <li>Amenities</li> <li>Business operators' responses</li> </ul>
<i>Mobile apps</i>	<ul style="list-style-type: none"> <li>iPhone</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>PDA</li> <li>iPhone</li> <li>iPod touch</li> <li>BlackBerry</li> <li>Android</li> <li>Windows Mobile</li> </ul>	<ul style="list-style-type: none"> <li>iPhone</li> <li>iPad</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
<i>Merchandise</i>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Guidebooks</li> <li>Apparel</li> <li>Software</li> <li>Subscription</li> <li>Corporate editions</li> <li>Wine</li> </ul>	<ul style="list-style-type: none"> <li>Guidebooks</li> <li>DVDs</li> <li>Travel goods</li> <li>Travel magazine</li> <li>Insurance</li> <li>Phone cards</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
<i>Member awards</i>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Hall of Fame</li> <li>Travel writer of the year</li> <li>Travel photographer of the year</li> <li>New member of the year</li> </ul>	<ul style="list-style-type: none"> <li>Free <i>Zagat</i> guide</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>

<b>BigVillage</b>	<b>Dopplr</b>	<b>Foursquare</b>	<b>Suite101</b>	<b>Yelp</b>	
<ul style="list-style-type: none"> <li>Travel enthusiasts</li> <li>Experienced travellers</li> </ul>	<ul style="list-style-type: none"> <li>Business</li> <li>Frequent travellers</li> <li>Networkers</li> <li>Social media users</li> </ul>	<ul style="list-style-type: none"> <li>Social media users</li> <li>Networkers</li> <li>Extroverts</li> </ul>	<ul style="list-style-type: none"> <li>Contributors: freelance authors</li> <li>Readership: general</li> </ul>	<ul style="list-style-type: none"> <li>General</li> <li>Social media users</li> </ul>	Target audience
<ul style="list-style-type: none"> <li>Accommodation</li> <li>Travel tips</li> <li>Travel stories</li> </ul>	<ul style="list-style-type: none"> <li>Hotels</li> <li>Restaurants</li> <li>Locations</li> <li>Sights</li> </ul>	<ul style="list-style-type: none"> <li>Restaurants</li> <li>Bars</li> <li>Cafés</li> <li>Hotels</li> <li>Services</li> </ul>	<ul style="list-style-type: none"> <li>Travel stories: general and specific destinations and sights, and hotels</li> </ul>	<ul style="list-style-type: none"> <li>Restaurants</li> <li>Bars</li> <li>Cafés</li> <li>Venues</li> <li>Other services</li> </ul>	Coverage of reviews
<ul style="list-style-type: none"> <li>Australian travellers to international destinations</li> </ul>	<ul style="list-style-type: none"> <li>International</li> </ul>	<ul style="list-style-type: none"> <li>International</li> </ul>	<ul style="list-style-type: none"> <li>International</li> <li>28 countries</li> <li>8,000 free lance writers</li> <li>27 million visitors per month</li> </ul>	<ul style="list-style-type: none"> <li>Mainly U.S.</li> <li>25 million visitors per month</li> <li>3.3 million contributors</li> <li>9 million reviews</li> </ul>	Market and size
<ul style="list-style-type: none"> <li>5-point ratings scale</li> <li>Free-form reviews</li> <li>Registered members only</li> </ul>	<ul style="list-style-type: none"> <li>Recommendations of favourite venues in specific cities</li> <li>Free-form reviews</li> <li>Registered members only</li> <li>Zagat reviews</li> </ul>	<ul style="list-style-type: none"> <li>Check-ins to venues</li> <li>Comments and reviews posted on social networks (<i>Facebook, Twitter</i>)</li> <li>Registered members only</li> </ul>	<ul style="list-style-type: none"> <li>Travel writing by participating freelance authors</li> <li>Readers can rate published texts</li> </ul>	<ul style="list-style-type: none"> <li>5-point ratings scale</li> <li>Free-form reviews</li> <li>Members only</li> <li>Members rate posted reviews</li> <li>Business operators' responses to reviews</li> </ul>	Style of reviews
<ul style="list-style-type: none"> <li>Links to third-party services</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>None</li> <li>Special offers to <i>Foursquare</i> members in some participating venues</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Special rates for <i>Yelp</i> members from some participating services</li> </ul>	Bookings
<ul style="list-style-type: none"> <li>Screen name</li> <li>Contribution stats</li> <li>Travel stories</li> </ul>	<ul style="list-style-type: none"> <li>Screen name, location</li> <li>Map and timeline of past and planned trips, with itineraries</li> <li>Visited and recommended venues</li> <li>'Personal velocity'</li> </ul>	<ul style="list-style-type: none"> <li>Name, location</li> <li>Badges and 'mayorships'</li> <li>Activity stats</li> <li><i>Twitter</i> and <i>Facebook</i></li> <li>Friends list</li> <li>Top 12 venues</li> </ul>	<ul style="list-style-type: none"> <li>Free-form profile</li> <li>List of contributions</li> </ul>	<ul style="list-style-type: none"> <li>Screen name, location</li> <li>Participation stats (reviews, posts, friends, fans, photos)</li> </ul>	User profiles
<ul style="list-style-type: none"> <li>Address</li> <li>Members' photos</li> </ul>	<ul style="list-style-type: none"> <li>Address</li> <li>Photos</li> <li>Map location</li> <li>Zagat reviews</li> <li>Members' photos (from <i>Flickr</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Address</li> <li>Map location</li> </ul>	<ul style="list-style-type: none"> <li>Descriptive texts from freelance authors</li> <li>Authors' photos</li> </ul>	<ul style="list-style-type: none"> <li>Address</li> <li>Opening hours</li> <li>Amenities</li> <li>Map location</li> <li>Members' photos</li> </ul>	Venue listings
<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>iPhone</li> </ul>	<ul style="list-style-type: none"> <li>Android</li> <li>BlackBerry</li> <li>iPhone</li> <li>Palm</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>BlackBerry</li> <li>iPhone</li> <li>iPod touch</li> <li>Android</li> <li>Palm Pre</li> <li>Yelp mobile site</li> </ul>	Mobile apps
<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Magazine, guidebooks</li> <li>Gift vouchers</li> <li>Phone cards</li> <li>Music</li> <li>Stickers</li> <li>Expertflyer membership</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Apparel</li> </ul>	Merchandise
<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Membership and booking loyalty scheme</li> </ul>	<ul style="list-style-type: none"> <li>Badges</li> <li>Complimentary offers from some operators</li> </ul>	<ul style="list-style-type: none"> <li>Advertising royalties</li> </ul>	<ul style="list-style-type: none"> <li>'Elite Squad' membership</li> <li>Complimentary offers</li> <li>Peer voting system</li> </ul>	Member awards

## The Market Leader: *TripAdvisor.com*

*TripAdvisor* was founded in 2000 by Stephen Kaufer (who remains as current CEO) as a free travel guide, assisting travellers in gathering travel information. Today the site is amongst the most popular interactive travel fora. The company is part of the TripAdvisor Media Group (owned by Expedia) which is currently managing 14 travel brands: *TripAdvisor*, *Virtual Tourist*, *Cruise Critic*, *Seat Guru*, *TravellPod*, *Airfare Watchdog*, *Booking Buddy*, *FlipKey*, *Holiday Watchdog*, *Independent Traveler*, *Onetime*, *Smarter Travel*, *Frequent Flier*, *Travel Library*. The headquarters of the company are in Newton, Mass., while the company operates international Websites in the UK, Germany, France, Italy, Spain, India, and Japan.



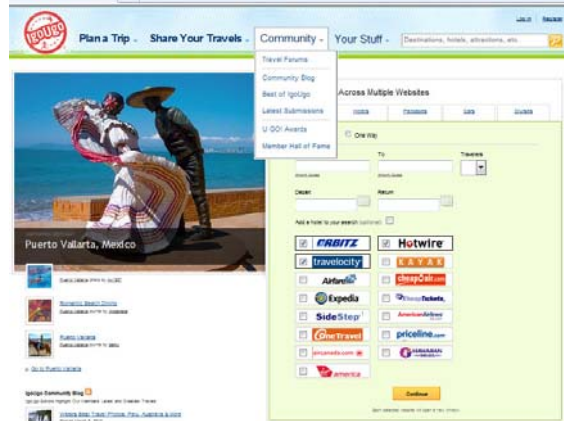
The company's business model is based on the aggregation of the user-generated content contributed by nearly 11 million members, which it provides as a free service to users. The company mainly relies on revenues from advertising on its Website, which features over 30 million traveller reviews and opinions, and information on over 400,000 locations. Businesses featured on *TripAdvisor* are categorised as hotels, attractions, restaurants, and tourism organisations. Operators are able to include their establishments in the Business Listings, for an annual subscription fee; they also have the ability to respond to user reviews of their services.

*TripAdvisor*'s discussion fora are classified by geographic regions. Posts in fora are visible to visitors, but in order to reply, ask questions, post a new topic, send a private message, or write a review, it is necessary to become a member by creating a profile. User profiles are presented by screen names, and the site encourages users to use screen names instead of their real names. Accounts are connected to the member's email address, and list information about their country and city of residence. Upon registration, members start receiving weekly newsletters highlighting the latest reviews and special deals. Additionally, members are able to create their own travel maps with the places they have already visited or are planning to travel to. These maps can be shared with the *TripAdvisor* community, providing an opportunity for well-travelled users to build their authority on the site. Information about members which is displayed on the site includes their length of membership, preferred travel style, reasons for travelling, and number of review contributions. The site features hotel reviews in several languages – English, Chinese, Danish, Dutch, French, German, Italian, Japanese, Norwegian, Spanish and Swedish.

## Second Place: *IgoUgo.com*



*IgoUgo* was founded in 2000 and is owned by Sabre holdings, which also runs the Website. The site covers over 9,000 destinations, and has over 500,000 members. It started operating as a tool providing price comparisons and direct booking facilities, but has developed into a site for user-generated reviews and recommendations. Initially, the site attempted to distinguish itself from *TripAdvisor* by allowing only registered users to post reviews; however, *TripAdvisor* has since instituted a similar requirement. That said, *IgoUgo* continues to stress the quality of its user-generated content and the transparency of its review process, with every review accompanied by the member's profile, even if in practice there is only a limited difference between the two sites. (Both *TripAdvisor* and *IgoUgo* are accused by Tim Zagat, one of the owners of Zagat Survey, for failing to filter their user-generated content sufficiently since they “put everything up raw”; cited in Sharkey, 2008.)



User registration on *IgoUgo* requires members to provide their email address, city and country of residence, as well as age. Visitors are invited to create profiles by uploading their profile photo and describing themselves as particular types of travellers, choosing their favourite travel quotes and sharing their experiences or travel journals from previous trips with the community.

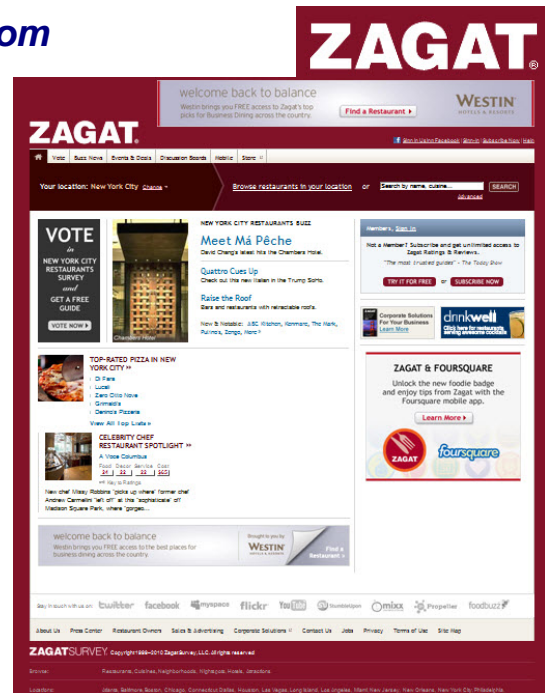
On-site fora are classified by destination (geographic regions), interests, and site news (updates, blogs, help). The site also highlights the editors' choice of the “Best of *Igougo*”, and its editors check and approve every review and photo submitted. User-generated content is eligible for ‘GO Points’, earned by registering and sharing reviews, stories and journals with the community. In this way, the system honours those members whose exemplary work and long-time dedication are the foundation of the Website's success; its leading users are inducted into the *IgoUgo* Hall of Fame.

This rewards system is operational for users in Australia, Canada, France, Germany, the UK, and the United States. Australian members are offered rewards in the form of American Airlines and Lufthansa frequent flier miles and gift certificates for *Barnes & Noble* and *Dymocks* books and *Chaos.com* music.

## Crowdsourcing Guidebooks: *Zagat.com*

Private company *Zagat Survey* was established in 1979 by Nina and Tim Zagat as a publisher of print guidebooks for restaurant connoisseurs in New York. In 2000, one third of ownership was sold to General Atlantic, while in 2008 the company was placed on the market at a price US\$200 million, without success. Accordingly, the company has decided to “grow business organically” (*New York Times*, 2008).

The idea behind *Zagat* is that people would prefer to see restaurant recommendations from their friends rather than from professional critics: the first edition of the printed *Zagat* guide was an overview of 100 New York restaurants that collected ratings from 200 contributors. In addition to restaurant ratings, *Zagat* now also reviews hotels, nightlife spots, shops, zoos, music venues, movies, theatres, golf courses, and airlines. Its guidebooks are mostly focussed on major US cities: New York, Boston, Chicago, San Francisco, Los Angeles, Philadelphia, and Washington, D.C., as well as international capitals such as London, Paris and Tokyo.



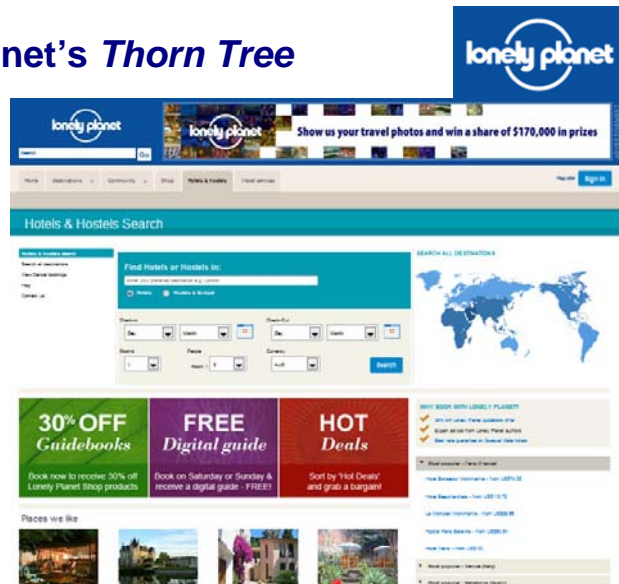
Businesses are evaluated on a 30-point ratings scale and through text descriptions, which are collected through the Website as member reviews and suggest that contributors address specific categories (e.g. food, decor, service, cost, and other observations). By 1999, the company had established a community of some 100,000 reviewers in 45 cities across North America and Europe; by 2005, the survey was covering some 70 cities and involved 250,000 members reporting on local establishments. Allegedly, its guidebook covering Parisian restaurants outsells the *Michelin Guide for Restaurants* (De La Merced, 2008). This documents the potential for crowdsourcing approaches in the reviews, ratings and recommendations field to generate substantial value.

The reviews submitted by *Zagat* members are edited and summarised by the site’s staff, and are available as printed guides, through mobile applications, and on the *Zagat* Website (but only fee-paying members are able to see the cumulative ratings for a specific venue). Users are able to build up a profile on the site, which provides an exhaustive picture of their personal interests, including their contribution history and their information in categories such as favourite restaurant, favourite dish, favourite cocktail, and favourite holiday destination; the profile also links to the member’s online presence in other social media spaces.

The *Zagat* community remains built primarily around food connoisseurs, but other leisure activities have become another market niche on which *Zagat* is focussed: some 1200 US resort golf courses have been rated and reviewed by now, and a special *Zagat Golf* iPhone application has been made available by the company. Further, in addition to its print and digital guidebook editions, *Zagat* has also begun to offer a variety of branded merchandise, including leather-bound guidebook editions, *Zagat* apparel such as t-shirts, chef’s hats and coats, and even a selection of wines.

## Revamped Old Media: Lonely Planet's *Thorn Tree*

Lonely Planet Publications was founded in 1972, as a publisher of travel guidebooks, but experienced significant financial difficulties as increasing numbers of travellers began to rely on online information sources and guidebook sales declined. In 2007, BBC Worldwide acquired a 75% stake in the company, which changed its name to Lonely Planet in 2009. Lonely Planet has an established reputation in the travel community through their published editions (500 titles), while their travel forum *Thorn Tree* ([www.lonelyplanet.com/thorntree/](http://www.lonelyplanet.com/thorntree/)) has attracted an estimated one million members who share tips and advice. The *Thorn Tree* community site features travel fora and community blogs as well as ratings and recommendations.



Its members are able to receive or give advice on the *Thorn Tree* forum, to join online groups of like-minded travellers or start their own groups, to rate and review destinations, and to plan trips and create itineraries. Additionally, *Thorn Tree* offers its members a newsletter, mobile phone applications (among first travel content providers to offer iPad app), blogs by Lonely planet authors and community members, the Travel Forum, and a travel magazine. The site is structured to sustain the company's main line of business (publishing travel guides) and also features reviews and recommendations of hotels as written by Lonely Planet authors.

The *Thorn Tree* travel forum is organised into 'branches', including the Departure Lounge (destination information divided into geographical regions), the Lobby (featuring general travel themes such as health, tech gadgets, biking, diving & snorkelling, alternative transport means, and living abroad), Check in with Lonely Planet (offering chats about Lonely Planet products, an FAQ, information about Guidebook Updates, and Error Notifications), the Tree House (discussions about culture, food, travel videos and photography, travel advice for women, and sports-related travel), and a Sell, Swap & Meet Up section (enabling users to organise housesitting, buy and sell travelling gear, and find travelling companions).

While the *Thorn Tree* community itself is now operating as a relatively stable and active community of travellers, and as an extension of the company's main activities into the online environment, it nonetheless retains the appearance of an add-on, rather than a fully integrated element of Lonely Planet's publishing strategy. Lonely Planet Publications does not appear to have made any significant efforts to adapt or change its core business – printed travel guides – to better accommodate the growing importance of online ratings and recommendations or to draw on the accumulated knowledge of the community for its printed guides. Realistically, the *Thorn Tree* community could be perceived merely as an opportunity to aggregate a substantial number of e-mail addresses for direct marketing, rather than as a platform for the development of an alternative business model.

## Added Value: *Stayz.com.au*

Established in 2001 as an online holiday properties listing service, *Stayz* has become one of the leading Websites for renting holiday accommodation in Australia. In 2005, the Stayz Group was acquired by Fairfax Digital, a division of Fairfax Media, which manages a portfolio of classified Websites including *Hotels.com.au*. *Hotels* complements *Stayz* by offering hotel accommodation in local and international destinations. *Stayz* remains focused on the Australian holiday rental market, listing a wide variety of lodging facilities by type and indicating the style of amenities and services provided by the various establishments.

On average, *Stayz* has 550,000 unique visitors per month; it offers some 25,000 listed holiday rental properties and claims to have completed over 430,000 bookings for overnight accommodation over the past twelve months. A form on the site allows tourists to directly contact the managers of listed businesses, in order to ask questions or negotiate prices. This model allows for a direct communication flow between potential clients and business owners, resulting in a high number of comments and ratings that create interest and market demand.

The on-site user community is able to evaluate individual establishments by posting personal entries to the accommodation's Guestbook; such comments may be made anonymously or from an established user account. The site also uses a 5-point rating scale, and comments from the Guestbook are displayed alongside the ratings. However, it appears that if a property has not been rated by any previous visitors or contributors of Guestbook comments, a five star rating is automatically awarded to an accommodation; this, of course, may be potentially misleading for prospective renters.

While *Stayz* is mainly focussed on providing a general search and contact interface for non-hotel accommodation, then, user-generated ratings and recommendations are already used to some extent as a value-adding mechanism on the site; they provide further information for individual accommodation options. This role could be further extended by implementing more sophisticated ratings and recommendations functionality, and/or connecting listings on the site to the feedback information generated by users of mobile tool *Foursquare* or of the other review sites.



## Niche Travel: *BigVillage.com.au*

Founded in 2006, *Big Village* is an accommodation search that lists only operators which have been reviewed and recommended by its users; it focusses on experienced travellers wishing to explore destinations off the beaten track. The site provides information on accommodation, travel tips and tales, and a gallery of pictures, as well as providing additional services such as currency converters and text translators. The site does not offer advertising space or direct business listings. Businesses are listed only if they have been visited and reviewed by *Big Village* members. Although appearing primarily as an Australian-based site, *Big Village* features destinations from around the world and relies on a global community of travellers. A notable lack of Australian listings indicates that the site is predominantly frequented by Australians organising trips overseas.

When the site was launched, it invited prospective users to become one of the “first 1000 members” by contributing their travel stories, in exchange for special travel offers. There is a great sense of humour, warmth and wit in the community, which appears to be supportive of one another, but, it is also noticeable that user-generated content is somewhat outdated, mainly dating back some years by now. Members are encouraged to write about their discovery of interesting places, but even more about “closely guarded secrets only known to locals.” The site’s focus lies away from mainstream tourist destinations, organised tours and standard travel arrangements, and is instead directed towards non-traditional means of transportation, unusual experiences, and secluded locations.

Overall, then, *Big Village* constitutes a niche site specifically targeting a more demanding community of travellers. It is deliberately designed to encourage users to feel part of a select in-group. Perhaps for this reason, contributor posts are styled more like diaries or blog entries rather than reviews or ratings, but this also means that they do not contribute immediately to the dynamic of the Website. This may have contributed to the relatively stagnant state of the site at present. At the same time, *Big Village* continues to hold substantial potential as a site which addresses a specific community of interest.

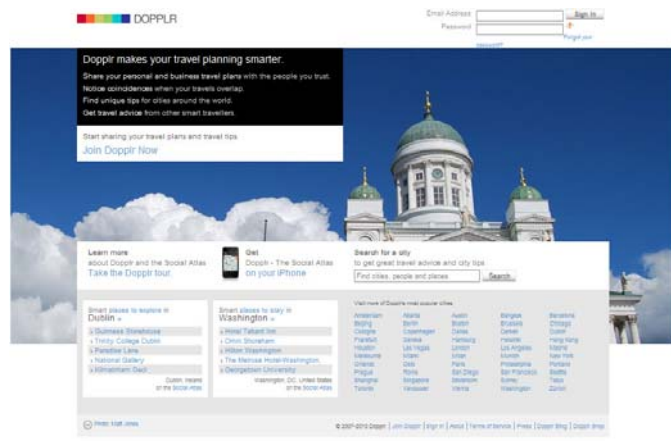


## Smarter Frequent Travellers: *Dopplr.com*



*Dopplr* was launched in 2007 as “an online service for smarter travellers”, allowing users to share their travel plans within their personal or business networks (e.g. on *LinkedIn*, *Facebook*, or *Twitter*). This start-up company had several rounds of angel investments until was finally sold to Nokia in late 2009.

*Dopplr* can be described as a travel-based social networking site which targets especially the business and frequent traveller market, allowing users to create profiles that include their travelling itineraries with destinations, dates and notes, and that may link to profiles on other social networking sites. The site also allows users to share their recommendations, comments, and personal experiences about cities and travel destinations around the world. *Dopplr* describes its free service as a compilation of its users’ “collective intelligence” in what it calls a Social Atlas; this Social Atlas collects information on the “travel patterns, tips and advice of the world’s most frequent travellers” (*Dopplr*, 2007). The service has been praised for being simple and focussed, compared to a variety of other travel planning sites (*MyTripbook*, *RealTravel*, *Tripwiser*), but is also seen as being of limited use to those who are not frequent travellers (Marshall, 2007).



*Dopplr’s* integration with its users’ existing professional or personal social networks is crucial. Users can add to their social networks on *Dopplr* by inviting friends, and especially by importing existing contacts from their other social networks; this also enables them to track if and when their own travel schedules overlap with those of their friends, allowing them to organise face-to-face meetings. Additionally, specific visited sights and locations can be placed on the traveller’s map (which is shared with their community), and evaluated through ratings or comments. Finally, to further complement the reviews contributed by its own members, *Dopplr* also links to the *Zagat* reviews of these venues.

While *Dopplr* membership is free of charge, the company has also announced that it may launch a premium service in the future; it also uses targeted advertisements and links to an online store offering a range of travel accessories and services for frequent and affluent travellers. Following its acquisition by Nokia, it remains to be seen how this social networking service for high-end travellers will be further developed.

## Everyday Mobile Social Gaming: *Foursquare.com*



Launched only in 2009, *Foursquare* was initially made available in 100 metropolitan areas of major international cities. Since January 2010, it allows its users to check in from any location world-wide. The site was preceded by *Dodgeball*, which was sold to Google in 2005 and closed down in 2009. Within its first year of operation, *Foursquare* has attracted 500,000 users, awarded 1 million ‘badges’ for user achievements, recorded 1.4 million user check-ins to its venues, and has provided 1200 special offers to members (Foursquare, 2010).

*Foursquare* is a location-based Web and mobile application that allows users to compete in a game-like fashion with their peers on a social network. Members gain points by exploring their neighbourhoods and ‘checking in’ to locations and businesses, some of which participate in the *Foursquare* programme.

Such bars, cafés, and restaurants reward the loyalty of frequent visitors by offering free or discounted services. Heavy *Foursquare* users are also honoured with the ‘mayorship’ for specific locations, and can unlock badges for trying new places or frequently revisiting favourite sites. Such achievements are automatically posted to the user’s social networks, including *Facebook* and *Twitter* – as with *Dopplr*, this integration is crucial for *Foursquare*. Members are also alerted to nearby businesses that currently have special offers.

The *Foursquare* model has been touted as the future of location-targeted advertising, forcing major players like Google to speed up the development of their own location-based services (Siegler, 2009). *Foursquare* provides information about the locations and local services visited by users everyday, and these data can be evaluated to identify the most popular establishments in a specific area; further, in addition to simply checking in to a place of business, users are also able to add personalised comments to their check-in messages, providing information for example about the quality of service and their overall satisfaction with their experience. Well beyond *Foursquare* itself, in other words, the recommendations which its users provide on an ongoing basis can be incorporated and operationalised in travel ratings and recommendations sites. As O’Donnell has put it, “being able to connect web advertising, recommendations, and social media buzz to an actual person walking into your store has long been the holy grail of the advertising world” (2009).



## Professional Reviews: Suite101.com

*Suite 101* is an online magazine and writers network which was started in 1997. It is owned by Suite101.com Media Inc., registered in Vancouver, and co-owned by Burda Digital Ventures. Burda Digital is an affiliated company of Hubert Burda Media, a publishing company from Germany currently operating in over 28 countries worldwide. The company manages *Suite101.de*, *Suite101.fr*, and *Suite101.net*, in the English, German, French and Spanish languages, with 27 million visitors per month.

*Suite101* is an online community of some 8,000 freelance writers who receive royalties in the form of a share in the site's *Google AdSense* and on-site advertising banners revenue. This arrangement allows professional writers the freedom to cover what they want and publish articles, for which they retain copyright; this enables them to generate royalties on a long-term basis. Participating writers are able to create their own writing portfolios, build an online reputation, and develop their profiles. Content on the site is edited by professional editors, who are accountable for maintaining the standard and quality of texts. Although writers are able to choose their topics according to their personal interests, in order to reach larger audiences and earn money they have to cater to the tastes of site visitors. Before publication all texts are edited by professional editors. Site visitors can rate authors' contributions, and have the ability to add their own comments (which are moderated before publication).

Travel writing is a major content section on *Suite101*, with numerous texts about locations and events that often also include links to local Websites. Although the site does not operate on a conventional model for user-generated content, then, its community of professional and semi-professional writers can nonetheless be seen to have created a collection of crowd sourced travel reviews and recommendations that constitute a valuable source of information for potential travellers; a similar model may be utilised in a Website focussed specifically around travel recommendations. The number of visitors to *Suite101* confirms the profitability of this business model, which offers quality information on travel destinations, local events, and cultural heritage.



The screenshot shows the Suite101.com website interface. At the top right, there is a search bar and navigation links for 'Freelance Writing Jobs | Today's Articles | Sign In'. The main content area features a 'Travel' section with an article by Lynn Coady. The article text discusses travel preferences and offers links to various travel deals such as 'China Tour 10Days AU\$1999', 'Normandy guided tour', 'APT European River Cruise', 'Busabout Europe Deals', and 'Inca Tours'. A 'Latest articles in Travel' section lists 'The Dole Pineapple Plantation' and 'Disney Give-A-Day, Get-A-Day Promotion'. A 'Popular Topics' sidebar on the right lists categories like 'Aus/NZ/Oceania Travel', 'SW U.S./Hawaii Travel', 'British Columbia Travel', 'California Travel', and 'China Travel'.

## Out of Competition: *Yelp.com*

Yelp Inc. was founded in 2004, and it is estimated that the site is accessed by 25 million visitors each month, placing it in the 100 most popular Websites in the USA. In March 2008, *Yelp* had 3.3 million contributors (Hansell, 2008). The site's business model is based on providing reviews of local businesses and offering social networking services. *Yelp.com* operates locally in the USA, Canada, Ireland and the UK; the focus of its activities remains on San Francisco, Los Angeles, Chicago and New York, however.



The distinctiveness of this community is in its size and in the dedication of members to contributing their reviews. The community has evolved a complex and stratified internal structure stretching from everyday users to a core group of dedicated authors who are recognised by the site operators as the *Yelp Elite Squad*. Members of the Elite Squad are usually very prolific contributors and write in an amusing, personable style; their contributions are praised by the community. Indeed, as Stross (2008) explains, regular users may save a lot of time by focussing on the reviews written by this *Elite Squad* and “ignoring the rest.” This select group is also required to disclose more personal information about themselves, however – though not as much as would expose them to negative repercussions from the owners of the businesses they review.

According to *Yelp*'s CEO Jeremy Stoppelman (cited in Hansell, 2008), “*Yelp* is about the reviewing experience... It is like a blog with a little bit of structure.” Significantly, not only do users rate local businesses, but their reviews themselves are in turn assessed by the community of users, who may award one of the three adjectives ‘useful’, ‘funny’, or ‘cool’ as feedback to the contributing author; such ratings also result in the placement of the most popular reviews in the site newsletter. Additionally, rewards for being the “first to review” a particular business or service encourage user participation. Community members are often striving to write witty reviews, since such activities are praised by the community. Local *Yelp* communities are often highly active, and occasionally hold social events for the most active reviewers. This also enforces the site's sense of the community and the formation of a social network amongst its members.

Notably, the site does not rely on advertising for revenue, and has only recently introduced banner ads. However, *Yelp* encourages businesses to pay to be listed first on its search pages, and to add photos and other information to their information pages; such business listings are categorized as sponsored listings. As noted, this has at times led the user community to become suspicious about overwhelmingly high ratings for specific businesses, generating heated discussion; on the other hand, the site has also been criticised by entrepreneurs who felt unjustly criticised. *Yelp*'s current system therefore allows business owners to respond directly to reviewers, and thus engage in an open discussion about the points of criticism raised in a review. Stoppelman claims that this way the site is enhancing transparency, and states that “we put the community first, the consumer second and businesses third” (cited in Hansell, 2008).

While *Yelp* does not specifically focus on travel recommendations, it provides an excellent example of a highly successful general product ratings and reviews Website; indeed, most Websites providing reviews, ratings and recommendations functionality in any industry would be likely to draw heavily from *Yelp* as the market leader in developing their own processes for engaging with and harnessing their communities of contributors. *Yelp*'s features for encouraging its contributors to contribute actively (by positioning admittance into the '*Yelp* Elite Squad' as the ultimate achievement – similar to *Foursquare*'s award of 'mayorship' of a business to the most frequent visitor) are especially notable in this regard (also see our section on *Yelp* in Bruns & Bahnisch, 2009).

## Conclusions

In order to employ travellers as a driving force for the tourism industry, the Nova Scotia Tourism Partnership Council (2003) recommends the following online strategy:

- Generate traffic to the Website.
- Engage the customers on the site.
- Convert the visit to a booking or sale.

Online reviews, ratings, and recommendation functionality is a core element in any strategy for engaging past, present, and potential tourists – and over the past few years, Websites which offer such functionality have evolved into reliable and highly influential travel information and booking services. With the proliferation of social media, it is no longer possible to ignore such user communities, or to rest on previous successes. Indeed, Australian Federal Tourism Minister Martin Ferguson has declared the beginning of a new era in Australian tourism marketing (2010), utilising social media sites for the promotion of Australia to prospective travellers.

A variety of businesses models have evolved among online ratings and recommendations Websites. Companies such as *TripAdvisor*, *IgoUgo*, and (beyond the tourism industry as such) *Yelp* have emerged as overall market leaders who have managed to explore and cater to the needs of consumers in travel and tourism. Their background as dot.com start-ups has provided them with a competitive advantage over some of the more traditional travel publishers, who were often too slow to recognise the opportunities arising from user-generated content and new models of online collaboration: *Lonely Planet*, in particular, only seriously explored user participation through its *Thorn Tree* site after its publishing business was significantly damaged by online competition. By contrast, however, restaurant guide publisher *Zagat* has successfully established a model which utilises its Website as a means to crowd source user-generated content for its print publications and mobile applications, and *Suite101* constitutes a genuinely new approach by a major magazine publisher to source quality writing (across a range of genres) from a community of freelance writers.

Other ventures have focussed specifically on niche markets: while *BigVillage* is aiming to cater for travellers with a taste for less well-known destinations, and may have great potential as a site for ecotourists and demanding travellers, it appears not to have realised that potential to date. Similarly, *Dopplr* is aiming at high-end travellers who are looking to combine travelling with social networking and seek to tap into the collective knowledge of other frequent fliers to find recommended accommodation and other services. Like *Dopplr*, *Foursquare* also connects its ratings and recommendations activities with established social networks, and further introduces gaming aspects to its community dynamics. Neither of these two services could exist without their social media components, and both also pay significant attention to the mobile elements of their operations.

Finally, *Stayz* – originally an independent small business, and now operated by Fairfax Digital – is reaching beyond Australia, and spreading to New Zealand and the United Kingdom. If such growth continues, it is likely that we will see a further extension of its community elements. While user ratings and recommendations functionality is already available, the on-site community does not yet exhibit substantial internal interaction or a strong sense of belonging; user participation opportunities on the site may need to be enhanced to work towards the development of a greater sense of identity, thus encouraging dedicated and long-term engagement and increasing the ‘stickiness’ of the site.

Overall, it is already evident that – as with many other consumer products and services – user-generated reviews, ratings, and recommendations for travel services have a significant role to play in informing consumer choices and influencing purchase decisions. Especially in an industry as rich with different purchasing options and as reliant on insider information based on past user experience as the travel industry, ratings and recommendations are a crucial source of information; indeed, they are the logical extension from a long history of travel guidebooks and other travel writing, which presented the recommendations of individual, especially privileged travellers.

Travel ratings and recommendations sites democratise travel writing by enabling any traveller (and not just Lonely Planet freelancers) to share their experiences and advice with their peers; at scale, what results from this is a sizeable database of travelling recommendations that market leaders like *TripAdvisor* can mine and monetise as a valuable resource. Much as other community-based online resources have diversified over time (from generic online communities to specific sites for users with specific shared interests, values, or beliefs), however, what these generic sites have as yet failed to address are a number of smaller but nonetheless potentially highly lucrative niche markets – ranging from executive travel through ecotourism to caravanning in Queensland. New sites which explore such opportunities may build on the established models for ratings and recommendations sites which this report has outlined, and customise them to attract and address these specific communities.

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Barbara Gligorijevic is a PhD candidate in Media and Communication in the Creative Industries Faculty at Queensland University of Technology. Her supervisors are Dr Axel Bruns and Dr Edwina Luck.

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In her professional career she has worked as a market researcher, marketing & advertising professional and journalist in electronic media. She was managing market research projects in southeast Europe for some of the largest international corporations. As a project manager she carried out numerous personnel trainings, presentations and team building sessions. In 2009 she was awarded the Smart Services CRC scholarship for her PhD research in the area of Social Media and moved from Europe to Australia. The focus of her research is user-generated content, consumer behaviour and word-of-mouth marketing in social networks.

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## Dr Axel Bruns



Dr Axel Bruns is an Associate Professor in Media and Communication in the Creative Industries Faculty at Queensland University of Technology in Brisbane, Australia. He is the author of *Blogs, Wikipedia, Second Life and Beyond: From Production to Producersage* (2008) and *Gatewatching: Collaborative Online News Production* (2005), and the editor of *Uses of Blogs* with Joanne Jacobs (2006; all released by Peter Lang, New York). He is a Chief Investigator in the ARC Centre of Excellence for Creative Industries and Innovation (<http://cci.edu.au/>), a member of the Association of Internet Researchers (<http://aoir.org/>) and a Senior Researcher in the Smart Services CRC (<http://www.smartservicescrc.com.au/>).

Bruns has coined the term *producersage* to better describe the current paradigm shift towards user-led forms of collaborative content creation which are proving to have an increasing impact on media, economy, law, social practices, and democracy itself. Producersage provides a new approach to conceptualising these phenomena by avoiding the traditional assumptions associated with industrial-age production models. His study of these environments builds on his work in the area of participatory or citizen journalism and blogging. In 2007, Bruns was a visiting scholar at the University of Leeds and Massachusetts Institute of Technology, where he further investigated the impact of producersage on democracy, citizenship, and the media. For more information about the producersage concept, see [Producersage.org](http://Producersage.org).

From 2010, Bruns is the leading Chief Investigator of a major ARC Discovery research project to trace and map Australians' use of key social media sites. The project will provide a first comprehensive overview of Australian public communication in the online environment, and offers new insight into the shape of Australia's networked public sphere.

He has also published extensively on blogging and citizen journalism, and is a Chief Investigator of an ARC Linkage project which in collaboration with SBS, Cisco Systems, and National Forum established the citizen journalism site *Youdecide2007* to accompany the 2007 Australian federal election. Bruns's Website, containing much of his work, is located at <http://snurb.info/>, and he contributes to the citizen journalism research blog [Gatewatching.org](http://Gatewatching.org) with Jason Wilson and Barry Saunders.

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## About us

### Smart Services CRC

The Smart Services CRC is a \$120m, commercially focused collaborative research initiative, developing innovation, foresight and productivity improvements for the services sector.

Smart Services' R&D programmes are based on a **user inspired** approach and are customer-focussed with outcomes translatable across the whole services sector. Initial research outcomes and demonstrators are principally associated with the finance, digital media, and government sectors (including health & education) to deliver exciting new capabilities for CRC Participants, and demonstrate the breadth of the applicability of our work.

Smart Services is a research and development partnership between 8 major industry and government players and six Australian universities, funded by the private sector and governments under the Australian Government's Cooperative Research Centre program. Its aim is the creation of research-enabled commercial outcomes for its partners and the benefit of Australia.

The \$120 million investment provided by Smart Services' industry, government and research partners, will be used to deliver outcomes aimed at returning at least \$250 million back into the Australian economy by 2016.

### Research

**In Media** - Smart Services' research agenda provides digital media companies in Australia tools, technologies and insights needed to understand how audiences are changing and clustering, and how to personalise their media experiences across a multi-channel, multi-platform environment.

**In Finance and Government** the research agenda delivers knowledge, tools and technology for the rapid identification and deployment of services, including online and mobile, to support business growth and creativity and improve operational efficiencies.

Smart Services Participants also look at the way in which services may be delivered in the future, how significant external factors may affect the need for and delivery of services to customers. This strategic research will deliver Participants new insights and opportunities to achieve a competitive advantage in their industry and be at the forefront of growth in the services sector.

### Services Innovation Foundry

Smart Services has established a Services Innovation Foundry in Sydney and Brisbane dedicated to fast-prototyping and testing of new services concepts while protecting participants' brands. The Foundry is focused on reducing time from proof of concept to deployed product in the market, by allowing regular and fast testing of R&D outcomes against a relevant test market.

The Foundry supports the activities of a dynamic group of associated researchers, students and industry participant staff with infrastructure in the form of software, networks and computational facilities; providing researchers and students an opportunity to work on industry projects; and industry a forum for recruiting talent to their organisations.



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