How Storytelling impacts Travelers’ choices

What data tell us

TRAVEL SAT Pulse

olivier.henry-biabaud@tciresearch.com
This movie attracts over 2 million visitors to Greece each year.

Source: TCI RESEARCH / TRAVELSAT®
We are unsure about this one...
Data-driven Intelligence
For Competitive and Sustainable Destinations

Revealing your destination competitive DNAs

New standards for capturing the pulse of destinations
BRAND REPUTATION – VISITOR EXPERIENCE – RESIDENT SENTIMENT

Endorsed international research solutions
MORE TRUST AND IMPACT IN YOUR DATA COMMUNICATION

Insights for destination marketing and management
GUIDING AND MEASURING YOUR SUCCESS

From real time data to long-term analysis
THE RIGHT DATA AT THE RIGHT MOMENT

Survey + Big Data based insights
ALL IN ONE PLACE
Methodology & Data sources
Competitive Metrics taking the Pulse of Destinations

SURVEYS + BIG DATA ANALYTICS

Visitor Experience, Profile and spending

Destination sentiment and social e-reputation

Residents sentiment towards local tourism

UNWTO 2011 Innovation Award
Storytelling, backbone of destinations’ appeal!

Storytelling is the most influencing driver of destinations’ attractiveness

#1 reason for choosing a destination for the 1st time

5x more impact than Advertising

3x more impact than Price/Deals

Source: TCI RESEARCH / TRAVELSAT®
~ 250 M international travelers are Social Storytellers

19% Like sharing their travel experiences on social networks, forums and blogs, also with people they may not know

9% Share their trip experience (on Facebook, Twitter, Instagram, Snapchat etc..) several times a day while on vacation
Who are most active Storytellers?
Segments used to sharing travel stories more than average

Markets

<table>
<thead>
<tr>
<th>Country</th>
<th>Index</th>
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<tr>
<td>Taiwan</td>
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<td>Brazil</td>
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<td>Russia</td>
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<td>Spain</td>
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Demographics

- Directors, Managers: 156
- Students: 115
- 25-40 years old: 136
- Families: 118
- Solo Travelers: 116
- Art lovers: 150
- Relax seekers: 156
- Social volunteers: 164
- Theme parks visitors: 163
- Golf visitors: 170
- Sportive events attendees: 172
- Cultural events attendees: 166
- Luxury seekers: 159
- Airbnb /private rentals: 179

Index 100 = average visitors
Storytellers are also more satisfied visitors … and active destination ambassadors

Destination Recommendation Index (Net % - World)

- Active Storytellers: 82%
- Average Visitors: 72%

+10 pts!
Who is telling the story matters as much as the story itself

The question of trust in the storyteller is ESSENTIAL

Sources mostly trusted by Germans for planning a Cultural / Arts of Living trip

- Friends & relatives recommendations: 37%
- Official destinations' websites: 34%
- Travel guides (Lonely Planet, Fodor’s, Rough...): 31%
- Travel Agent advice: 25%
- Search engines (Google, Yahoo ...): 24%
- Reviews / forum websites (TripAdvisor, Yelp...): 23%
- Travel booking websites (Expedia, Kayak,...): 21%
- Brochures, prints of destinations: 19%
- Tourism Offices: 14%
- Social networks (Facebook, Twitter,...): 10%
- Articles in "lifestyle, culture" mag.: 9%
- Airline companies' websites: 4%

Trust levels significantly vary per market and travel motivation!
TOP Destinations chosen mostly from storytelling

Examples of destinations attracting first timers thanks to positive storytelling

<table>
<thead>
<tr>
<th>Peers storytelling</th>
<th>Impact &gt; 45%</th>
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<td>Dubai</td>
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Positive Sentiment Index – Culture (Spring 2018)

Cities enjoying the highest share of positive stories about Culture

TOP10 CITIES – Based on % OF POSITIVE STORIES ABOUT CULTURE

1. Edinburgh
2. Frankfurt
3. Bordeaux
4. Valencia
5. Cordoba
6. Amsterdam
7. Stuttgart
8. Malaga
9. Helsinki
10. Porto
Storytelling reveals the diversity of your destination appeal

Culture related Sentiment During the period

Edinburgh positive cultural storytelling driven by:

- **People**, who are integral part of the culture
- Exceptional **vibrancy / living cultural value**
- Large and niche **Festivals & Events** on unique topics (Fringe, Marathon, Cinema, Comedy, Craft beers…)
- **blending of experiences** beyond conventional culture (outdoor arts, sports, nature, music, F&B…)
- Strong **cinema influence** (Avengers Infinity War film locations and articles, Cinema Festival)
- “**Nature-imbedded”** cultural expression forms
- Sites’ accessibility for **travelers with special needs**
- Support from the **private sector** (Airbnb, hotels and daily product brands promoting festivals…)
- **Students / University presence** adding stories
Stories Examples
Fueling the Cultural Reputation of the City

One team of 30 women created a brand new beer

claire galloway  a postée une publication

...available at last weekend's Edinburgh Craft Beer Festival. Led by ... addition to the Edinburgh Craft Beer Festival. The aim of this...  

publié le 28/05/18 à 13:11 | Blogs | Royaume-Uni | scottishfield.co.uk

Visit Scotland and AirBnB launch 'authentic...'

image pa  a postée une publication

...said: "Airbnb travellers visiting Edinburgh can now unearth hidden ... unique arts, culture, and food for which the city is renowned. "For...  

publié le 21/03/18 à 12:53 | Journaux | Royaume-Uni | dailyrecord.co.uk

Avengers: Infinity War inspires Marvel themed tour of Scotland

image visitscotland  a postée une publication

...were filmed in Edinburgh and VisitScotland have created an ... able to travel through time like Stephen Strange, but a visit to the...  

publié le 02/05/18 à 09:05 | Journaux | Royaume-Uni | dailymail.co.uk

Wheelchair-friendly travel/ with WheelchairWorld.org

a postée une publication

I do a lot more travelling in the UK visiting the Edinburgh Comedy Festival, the Isle of Wight ... that I would love to visit and are wheelchair accessible! Visit us at...  

publié le 02/06/18 à 10:00 | Blogs | Royaume-Uni | motability.co.uk

'I've seen people hugging sculptures'

anna bailey  a postée une publication

...its visitor numbers nearly double. Jupiter Artland near Edinburgh...  

publié le 07/05/18 à 02:05 | TV/Radio | Royaume-Uni | bbc.com

Jodie Fossey  @jodie_fossey  a retweeté une image

RT @EatenbyLionsUK: 🎬🎬 #WIN Tickets for Edinburgh International Film Festival 🎬 RT & Follow @EatenbyLionsUK #Competition Add PIC or GIF 😊 #WinitWednesday ends 30.05.18 1st + 2 Tickets + Travel + Hotel 🛋️ 2nd > Larry the Lion 🌍 3rd > Box of 48 Lion Bars 🍺 #EatenbyLions @EdFilmFest pic.twitter.com/WnLT9ieTi  

publié le 29/05/18 à 20:53 | Twitter | Royaume-Uni | twitter.com
“Bucket list” selfies do not create storytelling anymore
Emotional stories do!

Sources: TCI Research TRAVELSAT Pulse
“Bucket list” selfies do not create storytelling anymore
Non Tourism Events do!

Sources: TCI Research TRAVELSAT Pulse
Leverage Community – Hobbies centric Stories
Accelerates storytelling efficiency

Ateliers de Bacchus
@AteliersBacchus

En Californie, depuis le 1er janvier on peut déguster un verre de vin tout en se faisant couper les cheveux...
https://t.co/MU4leEW1ti

Sources: TCI Research TRAVELSAT Pulse
Discovering your “Ghost Ambassadors”
Accelerates storytelling efficiency

A Japanese architect (Saana) driving Japanese visitors to the Louvre in Lens (France)…

A game fueling Peru adventurous reputation…

* TEST * Shadow of the Tomb Raider: efficiency for originality? –-

drbyos created a post

...starting a dangerous journey that will bring them straight to Peru. We are generally limited to a … plant a world that is credible, mysterious and extremely compelling. A graphic delight, but also…

Published on 12/09/18 at 00:09 | Blogs | Canada | archynety.com

Sources: TCI Research TRAVELSAT Pulse
When societal/sustainable issues infuse brands’ stories…

French Social Sentiment Snapshot - “Thailand and travel”

Positive stories

Negative Stories

 Lê...
When overtourism issues infuse the brands’ stories…

Overtourism Sentiment impacting the great city story

Positive stories

Lenovo (lenovo) a partagé une image

Barcelona does this to everyone. Heading into our final day at #MWC18 and still having a blast. #LenovoMWC #Barcelona #Catalonia #architecture

Pablo Martinez @ PabloMB 11. 5.

"Refugees Welcome" but "Tourists Go Home" Barcelona and its contrasts

Rob Kent @robkentzy 1. 2.

Should I visit Barcelona, given that the residents are sick of tourists and are blocking La Ramblas in protest? Quandary.
TakeAways...
The right story from the right teller on the right channel

Will make the difference for your destination

1. Millions of stories are produced daily, just select and amplify content best fitting your brand!
2. Amplify stories telling emotions more than just experiences
3. Diversify storytellers’ profile for building credibility and trust (peers, candid travelers, locals, journalists, travel writers, travel guides, DMO, private brands and businesses, celebrities…)
4. Leverage on non tourism / passion-based stories that fuel your destination attractiveness
5. Manage the brand reputation context that also put your story at risk
6. Find and engage with your “ghost ambassadors” (emerging products, brands, events, celebrities…)
We are a global leader in destination competitive analysis.

Our standpoint is international.

Our methodologies are endorsed and awarded by reputable tourism organizations.

We control smart integration of Big Data in combination with traditional surveys.

Our team is senior and highly flexible.

TCI Research is an independent UNWTO-Awarded market intelligence agency leading in international tourism and travel competitive analysis. It provides public and private players of the visitor economy with innovative research solutions and insights combining conventional surveys with controlled Big Data analysis covering the whole visitor journey.