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The Unravelling of User Generated Content: A Mixed Methods approach

by

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Abstract

This paper focuses on marketing and trends within digital marketing, more specifically the trend of User Generated Content (UGC). The study will follow a mixed methods approach. Firstly, by collecting relevant academic knowledge in a literature review and analyzing that content in order to understand the societal unravelling of UGC. Secondly, the literature analysis will be paired with an empirical data collection study of UK fashion brands in order to identify potential systematic correlation. The focal point of this paper will be on the brand rather than on the motivations of a consumer. Although the consumer is mentioned and discussed variously throughout this paper, it must not be confused with brand management and how UGC is harnessed and strategically used by the fashion industry.

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We hope you enjoy this paper.

Thank you!

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1 Introduction

Today, social media has 4 billion active users and every day 95 million images are uploaded online (Smith, 2019). Only twenty years ago, no one had heard the name Facebook and the word social media barely existed (Edosomwan et al, 2011). As technology has developed incredibly fast, so has the way people communicate, gather information and how business is conducted. This has been demonstrated from the transition from letters, newspapers and the telephone to digital entities. Furthermore, technology has bridged the gap between the social community and the corporate landscape as today's business environment evolves around the consumer and their demands, opinions and contribution to the market (Nieses, 2013). Though there is no doubt that User Generated Content (UGC) is a viable trend in digital marketing, there is little research on its foundations. The research that does exist such as the work from Brynyolfsson and McAfee (2014) discuss the exponential growth of technology and the opportunities it has provided. Furthermore, there are other scholars such as Tim O'Reilly (2009) who introduced the word Web 2.0 and participatory internet which is the more academic term for communicative sites, including social media pages. Clay Shirkey (2008) is one of the early scholars who predicted the incredible popularity of social media and how it can be used in a business environment and Neises (2013) provide us with the development of customer collaboration in marketing. Together these scholars create an accumulative comprehension of the unravelling of UGC and are the cornerstones of understanding the unravelling of UGC in this study.

1.1 Background

Technology has not only connected people worldwide and created spaces, such as the internet, for communication and interaction but it has given people free “access to the sum of all human knowledge” (Weber, 2009. p.4). The information uploaded online can then be used in various ways, such as for business reviews, recommendations, gossip, news, educational purposes to name just a few examples. In more academic terms, the internet, and the websites in which we communicate are referred to as Web 2.0 or as the participatory internet (Blank & Reisdorf, 2012). The term was introduced by O’Reilly back in 2009 when social media started becoming popular. Some of the most common sites are Instagram, Facebook and Twitter, none of which existed before 2005 (Edosomwan et al, 2011). These are online pages where individuals have learnt how to become successful in postmodern consumer capitalism (Marwick, 2013) and where they share experiences, pictures and videos of their everyday life.

More than 95 million images and videos are uploaded to Instagram every day, that is about 456,000 images every minute (Marr, 2019). Most of which are “tagged” or connected to consumer brands using hashtags (#) or mentions (@) (Olapic.com, 2019). The media is then shared with a network where individuals tend to compare, look for inspiration, do online shopping, connect with each other and learn and adopt social trends. We can see this based on how social trends develop and are adapted. The sites were originally designed for personal use however due to ever changing technology, consumer brands have now been forced to integrate their marketing into these channels in order to reach their intended audience (Kotler, Kartajaya & Setiawan, 2017). The images and videos uploaded by consumers online have now offered brands an additional source of marketing material. Because it is free to upload media, it is also easy to download images for free. It makes it easy for any brand to utilize images that contain their products. It also makes it easier for smaller brands, with smaller budget to gain more marketing material for their advertising, therefore spreading and growing their customer base (Marwick, 2013).

Clay Shirky (2008) was one of early scholars who saw the potential in customer participation and collaboration and therefore was able to predict the use of a participatory internet. In the era of digitalization along with rapid development of technology, the way companies and brands manage their marketing strategies have shifted (Kotler, Kartajaya & Setiawan, 2017). From

traditional marketing of newspaper advertisements and television commercials, to today's social media posts, ads, influencer marketing AI and technology innovation. Digital marketing is now a large focus for each marketing manager. Therefore, the information, images and videos on the sites of Web 2.0 have a different purpose other than purely personal.

The images, videos and media shared by individuals on social media are commonly known as UGC. There is a full industry of companies dedicated to streamlining and automating the harnessing and publishing of this content on to brand ecommerce sites. An example of one of these companies is Olapic who work with brands such as IKEA, H&M, L'Oreal. UGC is used on ecommerce sites in order to personalize the customer journey, inspire and encourage customers to purchase additional products. Affiliate companies also provide performance data on how the UGC is performing online in order for companies to assess whether they are getting a return of investment (ROI) (Parviainen, 2017). Data is crucial in today's technological landscape and it is not surprising that this data driven industry has developed so rapidly because not only can affiliate companies make life easier for brand marketing managers but it also provides hard data on its performance (Olapic, 2019). UGC is not a trend which arrived overnight or that anyone necessarily predicted, other than perhaps Clay Shirky (2008) in his "Here Comes Everybody" book, but it safe to assume the trend has progressively decreased the gap between the consumer and the brand.

The trend of UGC has grown substantially. From a customer perspective, brand images are not enough anymore and marketing has to adapt with social trends in order to stay relevant (Kotler, Kartajaya & Setiawan, 2017). Technology has allowed us to enhance and change photographic images to look more beautiful and portray models to have skinnier waists and adhere to certain standards. Consequently, customers have been pushed away from finding inspiration from models to finding it in their friends and network. With a participatory network such as Instagram and Facebook, it is incredibly easy to do so. A survey on marketing campaigns featuring models found that 76% of consumers think the ads are "very exaggerated" and based on the advertisements they would not make a decision on their purchase, if anything it would make them reluctant to buy because they could not relate to the model (Vroutas, 2018). Consumers have become more selective when shopping, wanting to view more options of a product as well as see more varied marketing content. For example, when purchasing a summer dress the consumer may be interested with alternative clothing or accessories the dress could be matches with or how it would look on a girl with dark skin or blond hair. Therefore, consumer pictures

allow brands to get marketing content from a diverse range of consumers. It is not only free material but saves the brand from hiring models from each demographic.

This brief background on UGC provides an insight to how many factors impact the development of the phenomenon. Although there is much research on how UGC can be used in digital marketing, for example in tourism (O'Connor, 2008), as well as on consumer motivation and what aspect of UGC are important for business success, there is an identifiable gap in its general foundations. Little research has been done about its origin and factors which has impacted its growth. Though some of it has been mentioned here it will be discussed in more detail throughout this paper. It is also important to understand that UGC is a relatively new trend and therefore the sources are not necessarily from an academic reference but rather from sites which specialize on social media and UGC, such as Forbes and McKinsey.

1.2 Purpose

The main purpose of this study is to establish a research foundation for future studies within digital marketing. The aim is to organize and test the literature to empirical data and analyze and draw conclusions based on the results. Within this purpose there are two sub purposes.

- A. Analyze academic literature in order to unravel UGC and support the empirical data.
- B. Find the empirical data and identify any systematic correlation for UGC in UK fashion brands in 2019.

Research Questions

1. How did the User Generated Content trend develop and what factors affected its development?
2. Is there a noticeable systematic correlation between the use of UGC and whether a UK fashion brand is considered a top or a bottom brand?

2 Methodology

The methodology chapter discusses the chosen research methods for this study. It will, in detail, go through what steps were taken in order to conduct a reliable and structured research. The study follows a deductive approach, applying a mixed methodology using both qualitative and quantitative methods. The qualitative approach consists of a literature analysis in order to understand the origin and affecting factors of UGC. The quantitative approach is a comparative analysis of fashion brands in the United Kingdom in order to identify a potential systematic correlation with UGC.

2.1 Research Approach

By taking a deductive approach we started by looking at theory and what the relevant knowledge could teach us about UGC. A deductive approach is essentially moving from a general knowledge base to a more specific one (Hyde, 2011). This is where the mixed methodology became applicable. The general knowledge is presented in the literature review (Chapter 3) and encompasses a wide range of information moving from a large overview to a more specific focus, however as researchers we did not feel it was a detailed enough argument to merely use one approach. Consequently, this study required a more powerful impact and needed more evidence-based conclusions which required the support of empirical data. Many similar social studies combine methods in a deductive approach (Hyde, 2011) as they can complement each other and help to expand the breadth of research and to compensate for any weaknesses of simply using one approach (Driscoll et al. 2007). For example, a weakness in this case, is that without quantitative data to support the conclusion, the literature could only provide anecdotal or opinionated viewpoints and therefore could not be definitively proven. By combining methods, we broadened our deductive approach and moved from a broad overview of the topic towards a more precise documentation of how the UGC landscape appears in 2019. Therefore

2.2 Philosophical Approach and Research Design

With our chosen mixed methodology comes different paradigms. Hall (2013) explains that mixed methodology, with qualitative and quantitative methods, can support each other but needs to be separated in order to not confuse or invalidate the data. We wanted to highlight the paradigms as it provided a structure for us as researchers on how we approached the qualitative knowledge and the empirical data. We chose to apply the multiple paradigm stance by Hall (2013) which is based on research by Teddlie and Tashakkori's (2003). This specific stance allowed us separate the two methodologies and therefore treat the data collection as if they were two individual studies.

The qualitative method, literature review, was based on an interpretivist paradigm and supported by a relativist ontology. It assumes that the researcher cannot separate themselves from the information that they obtain. We understand the knowledge based on our own experiences, and our reality "is constructed intersubjectivity through the meanings and understandings developed by society" (Qualres.org, 2019). It allows us to research and apply our own understanding and our own unique viewpoint to the articles and which therefore creates a more in-depth analysis.

The empirical data was based on a positivist paradigm. This assumes a realist ontology and objectivist epistemology. It assumes that there is one "reality" out there waiting to be uncovered by the researcher and that reality can be measured. It also assumes, because it is objective, that we as researchers can separate ourselves from the knowledge because there is only one "reality" and one way of understanding the data (Hathaway, 1995). For example, if four groups were to do the same empirical study and comparative analysis, based on the same criteria, they would all end up with the same list. This part of the methodology is objective because it is based on hard facts, however, it is important to note that the analysis and discussion will be derived from observation and any trends we as researchers identify.

2.3 Collection Method

Due to the multiple paradigm stance by Hall (2013) we were able to gather relevant information for the literature review and the empirical data separately. It was important that we started with the literature review as that information would aid us in the comparative analysis. The knowledge we gained from the literature review served as a foundation for the questions and the criteria we looked for during the comparison of UK fashion brands.

2.3.1 Collection of theory and relevant knowledge

The literature review was structured after nine subsections. The nine subsections were chosen based on their importance in relation to UGC and what information could support us in our empirical data collection. We started by brainstorming and placing UGC at the heart of a spider diagram (see below) and noting down themes and topics we knew to be connected to the phenomena, for example technology, marketing, social media, personalization etc. With this in mind we started reading numerous articles about these topics. The same process was repeated for any new topics that arose until we had exhausted the themes related to UGC.

Having conducted vigorous research and ensuring all avenues had been considered, our final task before presenting the academic knowledge was to narrow down the information to the most relevant topics. The knowledge was presented by create a funnel effect starting with the origin, being digitalization, and progressing towards the importance of UGC, which finishes with honesty and authentic marketing as the final key area. Significant smaller subtopics were discussed within the nine key areas.

The nine key areas are (1) digitalization, (2) early predictions, (3) competitive advantage, (4) customer experience, (5) customer collaboration, (6) User Generated Content, (7) who, how and why, (8) authentic marketing and (9) honesty is the best policy.

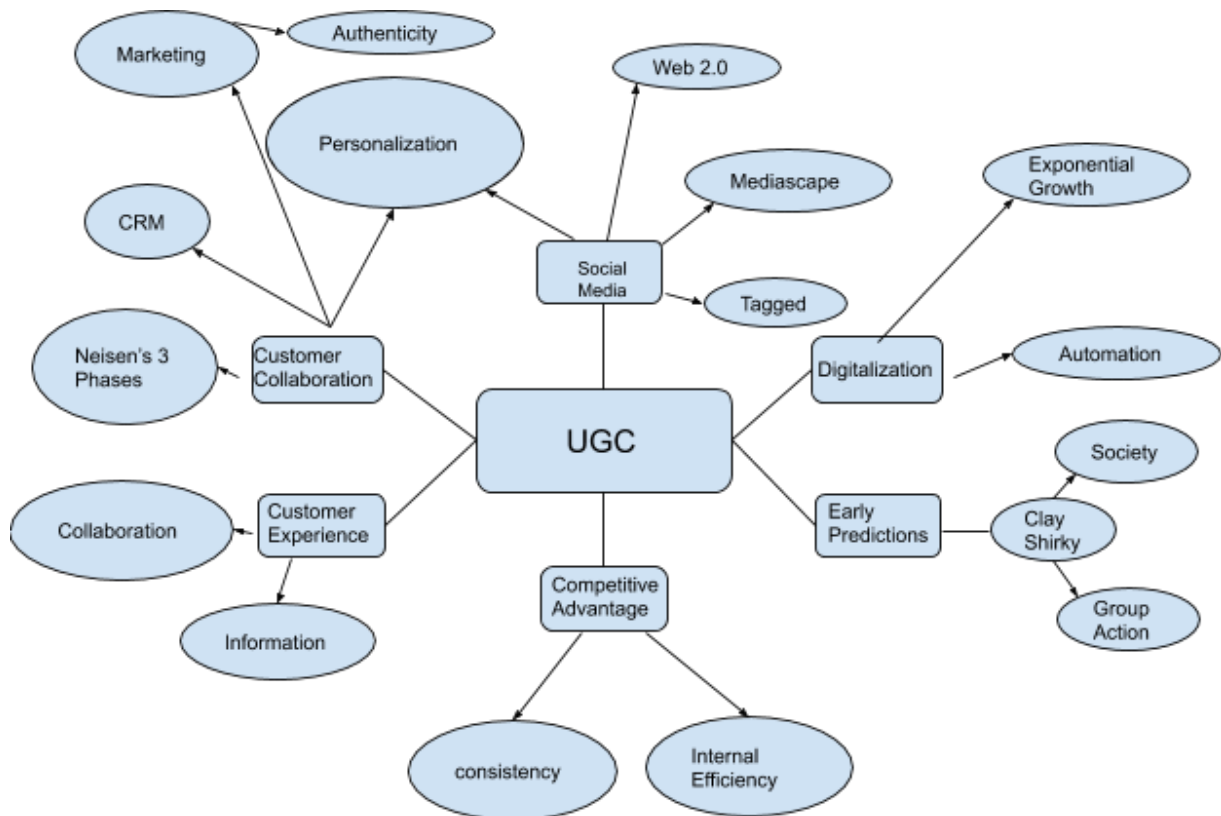


Figure 1. Spider Diagram of Literature Review Brainstorming

2.3.2 Empirical data collection

In order to do a comparative analysis, we had to create a list of companies that we wanted to analyze. We looked at the literature review and determined what industry, demographic, company type was most fitting for this study. Firstly, research shows that UGC is used most frequently and has the most impact on the fashion and apparel industry. Secondly, we chose to analyze brands from the United Kingdom as this is where the UGC trend was first recorded (Grossman, 2005) and the UK has the sixth largest revenue number for their fashion industry in the world (McKinsey & Company, 2018).

The original list, following the general criteria above, encompassed 180 fashion brands. Ranging from being founded 250 years ago to only 4 years ago. The brands also had a big difference in revenue. In order to narrow down the list further we looked back at the literature review and determined certain criteria (see below). After applying these criteria, we ended up with a list of 30 brands, out of which we chose the top eight and bottom eight to analyze.

Criteria:

1. Have a yearly revenue of minimum 50 million and maximum 450 million
2. United Kingdom based brand (Headquartered in the UK)
3. Been in the business under 150 years
4. Have an ecommerce website
5. Have an Instagram account
6. Brand and not retailer
7. Not a luxury brand

Table 1. Final list of 30 brands

Brand Name	Part of a bigger group? Y/N	Years in industry	Brand/Retailer	Annual Revenue	E-Commerce?	Luxury Y/N	National/International
Monsoon Accessorize	No	42	Brand	423m	Yes	No	International
AllSaints	Yes	25	Brand	303m	Yes	No	International
French Connection	Yes	47	Brand	317m	Yes	No	International
pretty little thing	No	7	Brand	300m	Yes	No	International
Hackett	Yes	40	Brand	285m	Yes	No	International
Missguided	No	10	Brand	276m	Yes	No	International
Paul Smith	No	49	Brand	261m	Yes	No	International
Phase Eight	Yes	40	Brand	257m	Yes	No	International
Joules	Yes	30	Brand	249m	Yes	No	International
Bonmarche	Yes	37	Brand	190m	Yes	No	National
Cornerlia James	No	73	Brand	183m	Yes	No	International
Quiz	No	26	Brand	171m	Yes	No	International
Cheaster Barrie	Yes	84	Brand	168m	Yes	No	International
Oasis	Yes	16	Brand	167m	Yes	No	International
Reiss	No	47	Brand	156m	Yes	No	International
Hobbs Ltd	Yes	38	Brand	132m	Yes	No	International
Miss. Selfridge	Yes	53	Brand	132m	Yes	No	International
Karen Millen	No	40	Brand	127m	Yes	No	International
Joseph	No	47	Brand	123m	Yes	No	International
Laura Ashley	No	66	Brand	122m	Yes	No	International
Berghaus	Yes	53	Brand	101m	Yes	No	International
Mint Velvet	Yes	10	Brand	101m	Yes	No	International
Cotton Traders	Yes	32	Brand	100m	Yes	No	International
Crew Clothing	Yes	26	Brand	100m	Yes	No	International
Ben Sherman	Yes	56	Brand	67m	Yes	No	International
Whistles	Yes	43	Brand	65m	Yes	No	National
Bench	Yes	30	Brand	61m	Yes	No	International
Musto	Yes	54	Brand	58m	Yes	No	International
Self Portrait	No	6	Brand	58m	Yes	No	International
Bravissimo	No	24	Brand	57m	Yes	No	International

The criteria were set to ensure that each company had similar circumstances such as similar standings on the market, background and size. This is because it would be unfair to compare a brand who has been in business for ten years to a brand which has been in business for 150. Brands such as Nike, Adidas, H&M are billion-dollar companies who have strong global standings with a well-established brand awareness and fan base. Comparing such a successful

brand to a less well-known brand, such as Bravissimo, who have 20-million-dollar revenue, would not be a fair comparison and make this study less reliable, this is discussed more in detail in section 2.5.

We had to ensure the brands were of similar size and with similar revenue, both in terms of company size but also in terms of marketing spend. For marketing spend we looked at factors such as Facebook ads and the number Instagram accounts. The reason we decided to go for brands with a yearly revenue between 50 million and 450 million is because it has been shown that young international brands tend to want to try new things and are not afraid to jump on trends and take any chance to get ahead (Hesmondhalgh, 2010). Furthermore, it has been demonstrated as a cheaper option to gain more marketing content (DeMers, 2017).

When we had created the final list, we again, used the knowledge from the literature review to create a set of questions for observation. These questions served as a guide during our comparative analysis in order to ensure that we had the same structure for each brand that we analyzed. It is important to note that the comparative analysis was observational and that questions were created in order to ensure a structured and streamlined collection process for each brand.

We used Google Forms (see appendix A) in order to structure ourselves and increase research reliability. The Google Form included ten questions, for example, “Is the brand promoting a hashtag or @mention on their homepage or social media account to generate more customer content?”. We then looked at the marketing, social media and ecommerce channels of each brand in order to systematically answer each question. This systematic process and using questions in order to guide our observational process resulted in the empirical data.

2.4 Analysis Process

2.4.1 Literature Analysis

In order to analyze and draw conclusions from the literature review we, decided on a process for analyzing based on an article by Berg and Lune (2004). It requires a systematic reading of the literature, record themes, trends, patterns and/or indications. The process required us to each

read the literature review multiple times in order to explicitly understand each section and identify potential patterns. This method also allowed us to understand how each section was connected. The analysis is structured by presenting key insights and discuss potential issues or theories that potentially had not been considered before to then provide an answer to research question one “How did the User Generated Content trend develop and what factors affected its development?”.

2.4.2 Empirical Data Analysis

Of the list of thirty brands, we chose the top eight brands and the bottom eight brands for analysis. When collected, the objective data was presented in a small table which shows a contrast of how the top eight brands compare to the bottom eight. These numbers and percentages were then discussed. We viewed the data and discussed potential explanations for the numbers based on the knowledge we gained from the literature study.

2.5 Validity and Reliability

In order to ensure a valid and reliable research study the following steps were put in place:

- The data collection process had to be structured and consistent, especially for the empirical data collection.
- The comparative data analysis had to be streamlined and discuss each criteria
- The knowledge sources for the literature review had to be maximum 10 years old (exception when discussion was about the past)
- Literature analysis had a structured and streamlined process (using Google Forms)
- Both researchers follow same structures for each method

These guidelines served as a structure to ensure that both of us followed the same rules and applied the same processes throughout the study. Furthermore, this process was required for a mixed methodology as separate approaches were necessary due to the philosophical underpinnings of each method.

2.6 Limitations

Due to the extensive methodology of this paper a few limitations were set in place in order to frame the research and not steer away from the purpose. Firstly, the theories and academic knowledge chosen for the literature review is limited to factors which directly affect UGC and impacts its use in business. Consumers and their motivations are not included, although it impacts UGC, a detailed presentation of the consumers and how their behaviors have evolved would confuse the direction of the study. There are also so many other comparisons and historical factors which can be considered but they do not help answer the studies research questions.

The comparative analysis of empirical data is limited to the top and bottom brands, the 19 brands which are technically the “middle” brands will be not be analyzed. As the inclusion of all brands would prevent a distinction being made between the top and bottom brands, it was considered that including middle brands would not gain any real value from the analysis. Therefore. in order to identify any systematic correlation for UGC in UK fashion brands and fulfil sub purpose B the comparison needed to be between two entities, such as top and bottom brands.

2.7 Chapter Summary

To summarize; in order to broaden our research study and to be able to have a powerful enough impact to be relevant today as well as ten years from now, a mixed methodology was most suitable. It allowed us to broaden our deductive approach and move from a very general knowledge of the topic to document how the UGC landscape appears in 2019. With a mixed methods approach comes different paradigms. The paradigms are important in order to ensure validity and reliability and served as a guide when creating structures for data collection as well as for analysis. The different methods can support each other and can be derived from in the discussion but should be separate when collecting the data. Hence why it was important that we started with the literature review and completed it before moving to the empirical data collection. We had to gather an extensive range of literature in order to understand what was

required in the comparative analysis. Therefore, two methodologies offered us a vast range of knowledge and provided us with a foundation in order to answers to our two research questions.

3 Literature/Theoretical Review

3.1 Introduction

The following chapter presents a selection of relevant theories and academic research related to UGC. After the presentation of theories and knowledge an analysis follows which discusses key insights and observations from the researchers in order to fulfill sub purpose A and answer research question 1. The references in the following section have carefully been chosen based on the author's credibility, publish date as well as their standing in the academic world (see Chapter 2). The nine key areas were chosen by the researchers and based on their connections to the UGC trend.

3.1.1 Digitalization

Though there are many definitions, digitalization is commonly referred to as the increased adoption or use of technology by an organization, industry, country etc. (Brennan & Kreiss, 2014, p.6; Parviainen et al. 2017). Different from digitization, digitalization refers to the process and “the way in which many domains of social life are reconstructed around digital communication and media infrastructures” (Bloomberg, 2018). Rather than about the actual information the technology entails. Though most academic and scholarly definitions of digitalization refer to social construction and the way technology affects the social aspects of life, other digital giants such as Gartner use digitalization in relation to business development and transforming business. More specifically, they use the term in relation to the use of information and how new technologies have shaped the way business is done. For example, through new business models, atomization of processes and streamlining of communication and procedures etc. Looking at various academics and large technological corporations, the use of the word “digitalization” changes depending on who uses it and for what purpose. Social scholars discuss the social aspects of adopting to a more digital way of life whilst global technological companies explicitly use digitalization to explain the digital business

transformation. This provides a bridge between the social and the commercial. Due to the nature of this study, digitalization will henceforth be discussed in relation to both.

In order to understand digitalization, one must look at the beginning and the speed in which is moving. It has been identified as one of the major societal trends which is changing society and the environment in which business operates (Parviainen et al. 2017). The history of digitalization can be traced back to the 1700 and has even been compared to the industrial revolution (Press, 2015). The reason why it has been referred to as a “revolution” is because it is moving in a much faster pace than any other change society has encountered. Since the 1700, when digitalization was first recorded, in its simplest form, society has not only experienced a rapid acceleration of technology but it has skyrocketed. Brynjolfsson and McAfee (2014) call this rapid pace exponential growth and in order to understand the multitude of this exponential growth they use the analogy of Moore’s Law and the chessboard analogy to explain the constant doubling. Moore’s law does not refer to how the world works but about the speed and success of computer engineers and the computer industry (Brynjolfsson & McAfee, 2014).

Since the 1900, technology, or more specifically computers have moved from being referred to mainly as the IBM, as well as taking up entire rooms of space, to today where we are only a few years away from developing a computer as intelligent as the human brain (Moravec, 1997). There has been a move from rather focusing on the size of the computer to raw data and how to use that data for success, whether it is socially or commercially. The development of technology and the process of digitalization has created the sites of Web 2.0 for interaction and learning. It is also currently used as a tool for co-creation of value between the consumer and the brand. This leads to the introduction of another term, digital transformation. This term, according to Bloomberg (2018), related to the customer driven, strategic business transformation. Digital transformation is about the customer and how a business changes its strategies in order to become more customer centric. The shift from a generic marketing and product production strategy to a customer centric one will be discussed in more detail further down. In order to understand how business strategy today places the customer in the center, one would need to understand how strategy looked before and what measured were used in order to gain competitive advantage.

3.1.2 Early Predictions

Clay Shirky (2008) is one of few scholars who discuss the significant use of technology and the manifestations of social effects not to mention how it can develop the commercial market and social trends as we know it. The development of technology has offered greater opportunities for collaboration between the market, companies/brands, and consumers. Shirky (2008) discusses the interplay between our world's existing institutions and new arising platforms, organizations, and websites that can pop up in the Internet's decentralized, self-driven structure.

As technology develops and new innovations and networks are introduced, new social behaviors develop. Specifically, a behavior Shirky calls group action. Group action has always been a fact, meaning that people tend to follow the actions and habits of others in their network. With the vast communication tools of technology, group action has been made significantly easier. With group action comes opportunities, just as digitalization has. Back in 2008 when Clay Shirky discusses the opportunities of technology, the UGC trend was not in the form we have today. Though UGC has always been around in various forms such in sharing of stories and TV programs such as "You've been framed" (BBC Academy, 2017) the form it is in today is and the frame in which it is used is significantly larger. Shirky (2008) saw the potential and stated that the new media and participatory internet offers greater opportunities for companies and brings a willingness of collaboration between the market, companies/brands, and consumers. Shirky also means that "given what we have today, the internet could easily become invisible high school, with a modicum of educational material in an ocean of narcissism and social obsessions"(Hartley, 2012, p. 95) It is the social behavior which is the driver, more specifically it is what he calls a ladder of activities in three stages. Sharing, cooperation and collective action is what drives the masses to what they are doing. Though Shirky (2008) was before his time, he presented the importance of seizing the opportunities of digitalization and of technology. As mentioned, digitalization has been compared to a revolution, Clay Shirky (2008) places color in that statement with his quote "Revolution doesn't happen when society adopts new technology, it happens when society adopts new behaviors" (p.16).

3.1.3 Competitive Advantage

Clay Shirky's (2008) predictions materialized a lot quicker than predicted. Due to the nature of digitalization and the exponential growth of technology, business environments and marketing

strategies changed substantially. The competencies and development of companies' infrastructure have been enhanced, along with the faster speed to look over customers' experiences and feedback. The innovations within digital technology which come with digitalization create new opportunities and forms of cooperation between companies but it also alters the relationship with clients as well as employees (Kiel et al., 2016 referring to Kagermann et al., 2013). Companies gain competitive advantage and accelerate their development through a multitude of ways. Some examples where technology developed have created competitive advantage are optimized resource utilization, atomization and reduced costs, increased employee productivity, optimized supply chain, increased customer loyalty and satisfaction (Coupette, 2015; Kagermann et al., 2015; Kaufmann, 2015; Loebbecke & Picot, 2015).

According to Schipperus's recent survey of 300 organizations, 63% of companies have a strategic plan in place for digitalization, it is a number which is increasing and one needs to consider that the adoption rates vary throughout the globe (Schipperus, 2017). The study, conducted by Digital Business Global Executive Study, MIT Sloan School of Management and Deloitte, shows that 26% of participating companies find themselves in the early stages of maturity in digitalization whilst 45% considered their company to be in a development phase. Furthermore, 29% of the respondents consider their companies to be mature in terms of digitalization (Kaariainen, Parviainen, Teppolaa & Tihinen, 2017). According to research, and a study by Kaariainen et al (2017) digitalization has impacted companies and brands in three main ways; internal efficiency, external opportunities and disruptive change.

Internal efficiency includes improved business process efficiency, quality, and consistency via eliminating manual steps and gaining better accuracy. Digitalization enables a better real time view on operation and results, by integrating structured and unstructured data, providing better views on organization data, and integrating data from other sources (Parviainen, 2017, p.12). Digitalization generates automation that helps employees enhance the sense of work satisfaction, and at the same time enable them to update the information once the data from the audience alters. And the saved time gives employees supplementary freedom and space to develop new skills and improve their capabilities. And Kumar and Jhala surely state an additional obvious benefit of digital marketing, including reducing total cost of ownership, easing of scaling up or down on-demand without incurring a heavy expense, increasing collaboration among workers, easy implementation and etc (Kumar & Jhala, 2017, p.13).

External opportunities include improved response time and client service, as well as possibilities for new ways of doing business. “During recent years, dynamic capability research has developed a framework outlining how firms adapt their physical, human, and organizational resource bases when facing situations of technological or market change” (Mezger, 2014, p. 430). New digital technologies can create opportunities for new services or advanced offerings to customers (Kaariainen, Parviainen, Teppola & Tihinen, 2017, p.5).

Disruptive changes involve changes in the operating environment of the company caused by digitalization; for example, a company’s current business may become obsolete in the changed situation (e.g., manual scanning of invoices replaced by electronic invoice).

3.1.4 Customer Experience

Like Schipperus said, customer experience is at the center of digital transformation. Well-developed companies normally have a clear and certain digital strategy. With the effect of digitalization, the word “digital customer experience” comes up. Digital customer experience has been described by Henry (2018) as “the sum of digital interactions between a customer and a company and the resulting impression that a customer walks away with”. The word customer experience (CX) covers anything from traditional customer service channels such as telephone, television to new digital channels where people use to interact with each other as well as companies. Digital customer experience (DCX), although its description by Henry (2018) focuses more specifically on the participatory sites of Web 2.0 can also include both the front-end services as well as the back-office process optimization (Liferay.com, 2019). Within DCX resides collaboration strategies. These strategies are varied forms of information sharing which is beneficial to both the company and stakeholders. Whilst many assume the word stakeholders purely refers to the owners of the business, supplier and employees it actually involves customer as well. Collaborations can be equally be described as a cooperative relationship where just as the business and brand received the latest information and feedback, so does the customers on latest products and therefore creating a better customer experience. From a brand perspective, the collaboration gives them an insight and an angle from the customer such as what they want in their digital journey and how easy they find the products they are looking for etc. From a customer point of view, they feel valued as their opinions and being heard. They also become a part of the process, gaining information about the company, products etc. Chun and S. Niehm

(2010) states that this collaboration is optimal because it provides “customers with beneficial outcomes utilizing their own competitive advantages on an equal basis” (p.4).

Although the sharing of information is crucial for customer experience, it is not enough. The visual aspect of a business is just as important and how streamlined the customer experience in their shopping journey is. This is where design, technology applications and differentiation come into place. By applying the collaboration strategy and regularly gaining feedback on what the business is doing benefits both parties. Findings show that some of the major benefits of collaboration include reduction of costs, and risks, higher sales and website traffic, more engagement. Brands have expressed their opinions on this and on what types of outcomes are more important. 55% said product and design outcomes were most important, followed by promotion (21%, price (20%) and place (4%) (Chun & S. Niehm, 2010). The results and discussions, around using collaborations with customers to enhance customer experience in the fashion industry, show that this type of strategy has become an essential value creating concept.

3.1.5 Customer Collaboration

The disruptive innovation and digitalization are now a large part of the strategic plan for brands. Customer collaboration is one of those opportunities from digitalization which has rapidly become more strategic, specifically within marketing. According to Neises (2013) “marketing has progressed over three phases—from the product-centric era through to the customer-centric era towards the era of collaborative marketing” (p.14). The first phase was introduced during the industrial revolution within production development technology. This meant that companies mass produced common products with no detailed target audience and no focus on the customer needs or wants. Due to limited machinery the ultimate marketing goal was to sell as much as possible without any sort of customer interaction. This means that customers were barely involved at any stage in the product creation process. Equally, it was never considered a good idea to include their needs and demands in order to develop the product. It was simply the companies who determined the necessary products for the mass market (Kotler, Kartajaya & Setiawan, 2016). At this product-centric era, marketing was considered a means to an end, an end which involved selling as much as possible. Kotler and Kartajaya (2010) describes it as an art of persuasion and even goes as far as calling it cheating.

The second phase is where the customer becomes more involved and where brands develop a more customer centric marketing approach. As technology develops, marketing found new opportunities in which to include the customer. The emergence of information technology and the participatory Internet allowed consumers to quickly absorb any sort of information. With this new information and will more well-informed customers, marketers were forced to focus more on the customer. This customer-centric marketing stage is when CRM was developed. CRM stands for Customer Relationship Management and includes various types of software in order to identify consumers' behavior as well as satisfying their needs, essentially putting customer retainment and customer relationships in the center of strategic marketing (Kotler, Kartajaya & Setiawan, 2010). Though the customer centric approach is a great start and we see the closing of the gap between customer and brand the approach still views the consumer as a passive target group rather than a collaborative asset, as described by Kotler, Kartajaya and Setiawan (2010).

The evolution of marketing did not stop there. In the early 21st century “information technology has penetrated the mainstream market and developed what is considered the new wave technology” (Kotler, Kartajaya & Setiawan, 2010). This is the third and final stage where the customer centric approach became more advanced and sophisticated. It became known as collaborative marketing.

With the help of social media and participatory sites of Web 2.0, individuals were no longer viewed as passive consumers of online content, but rather having turned into what Neises (2013) calls “prosumers”. It created a symbiosis of work and a collaboration where individuals were both customers and the producer of content. The advancement in technology has empowered consumers more than ever before. Given the participatory sites such as discussion forums, social networks and the blogosphere, it is easy for individuals to create original media content, express personal opinions, exchange information or just to simply communicate with one other. (Kotler, Kartajaya & Setiawan, 2010). Similarly, this media is then used by brands in order to gain competitive advantage and develop further. In this stage, it is not simply about the brands taking information from the customer but rather reaching out to them and making them a part of their journey, a co-creation of value. As it is strategic move to place the customer in the center of brand strategy it is also an assurity for brands because as well known, social media enables the masses to openly discuss the value of a brand in social networks. It is beyond

the company's control to be able to influence this directly (Greenberg, 2009) and by having a direct focus on customer relationship, it becomes a way of controlling what is said online.

Some benefits of customer collaboration include, increased customer awareness of news, new product ideas which in turn leads to lower R&D costs, increase customer engagement and loyalty and finally gaining more access to feedback (7 Benefits of Customer Collaboration, 2019). It comes down to hard data and seeing, in numbers, how customer collaboration impacts the business. As Schubert and Kosh (2002) explains that by collecting customer data and feedback as well as providing it to other customers in a personalized way, it can be described as a potential seed from a successful Virtual Community of Transaction" (Schubert & Koch, 2002).

3.1.6 User Generated Content

Due to increased customer collaboration, strategically utilizing UGC has become very popular amongst consumer brands. Digitalization and commercial trends have increased social behaviors such as posting images and videos on social media which in turn has offered businesses more content to strategically use in their marketing. Essentially, the social behaviors of consumers can now be monetized. As previously mentioned, the increased popularity of online media and of Web 2.0 means that consumers go beyond their passive role as purely information seekers to actively and regularly share their experience with their community (Tirunillai & Tellis, 2012). Instagram is an example of a Web 2.0 space or what O'Reilly (2009) calls participatory websites which emphasizes on participatory culture, UGC and easy to use websites. On Instagram, the community consists of both private accounts as well as business and brand accounts. It is a global site where images are shared and consists of two types of images. There are firstly, marketing images and ads, created and placed by companies to attract and inspire customers and secondly, there are Appadurai's (1990) mediascapes which refers to the electronic images and print media created in global culture. Appadurai's (1990) mediascapes are in more common terms called consumer pictures, or as we call it, UGC, and relate to the images uploaded by private users. To put it in simple terms, all private users of social media upload images of themselves, their surroundings and their friends. These images can then be "tagged" or connected to a brand or a company for recognition or to show where the item came from and can be bought. This way of communication and sharing is how "influencers" and "customer involvement" has been able to develop, as it is mostly public. It

has generated a completely new way of making money and individuals build careers on inspiring and uploaded images on social media and promote a lifestyle, brand or product to their followers. Clay Shirky (2008) predicted that technology would drive motivation and the competition between brands would generate a more innovative and creative market. Today the development of technology has enabled consumers to take pictures of their purchases (with high quality cameras) and share those images on public websites which can allow brands to take advantage of and use in their marketing.

3.1.7 Who, How and Why?

As a fairly “young” trend, the industry for specializing in harnessing customer content is relatively small compared to the number of brands who use it in the content marketing. By utilizing UGC brands have a more authentic and “real” marketing. It also allows for young and smaller brands to gain competitive advantage on strong established global leaders. Utilizing UGC is what Weber (2013) states is the new way for marketers to save money on marketing and at the same time reach more customers. If one were to look at the usage of UGC in transactional marketing through a social and neoliberal lens it would give the community and the impressionable public more authentic material. By using UGC, the use of enhancement software such as photoshop would be limited and instead of promoting overly skinny and one type of body, companies would promote their own consumers and real people and therefore diverse and more healthy individuals.

On the other hand, Salvatore Parise and Patricia Guinan (2008) discussed the phenomenon of UGC when it was first introduced. They argued that marketing managers were hesitant to use this type of content because it “represented a “risk” to the product brand” (p.4). The risk was that it was the consumers who were in charge of shaping the brand and how the product was being perceived on the market place rather than the brand itself (Parise & Guinan, 2008). However, as the technology has evolved more brands have been forced to adopt this type of marketing. That being said, not all brands tend to adopt UGC. Luxury brands such as Louis Vuitton, Louboutin, Dior etc. have been reluctant to embrace this trend as it does not align with their brand aesthetic. They tend to have brand aesthetics focused on a particular body type, class and look and the brands are more hesitant to explore new trends such as UGC. Furthermore, such established and historical luxury brands do not have the same need to get ahead and explore new trends as their brand is already well established and successful. Although this

might be the case, The Economist (2014) states that millennials and digital natives will be the main customers of luxury brands and therefore it is a trend which will catch up to the luxury brands as well. Every brand, including the high-end luxury brands should adopt a UGC strategy in order to keep sales up as “young people choose and buy differently” (The Economist, 2014). From a business standpoint, using customer images not only closes the competitive gap between global brands but gives the marketing manager more material for commercial use. Equally, as literature proves the importance of listening to the customer is essential for business success, UGC closes the gap between the customer and the brand as it establishes a co-creation of value. It means the brand does not need to spend time and money on models, photographers etc. to create brand images but can use “authentic” images created by the consumers. It is what Hesmondhalgh (2010) refers to as cheap labor. It is material created not by a paid agency or in house but done for free by a brands own customer base. Though there has been critiques against this type of labor and has been labeled as exploiting a “non-professional culture” and non-traditional, there is no company which does not take customer collaboration into consideration. Scholars Tirunillai and Tellis’ (2012) study, over a four-year period, supports the use of User Generated Content in transactional marketing. It shows a significant positive effect on return on investment when a company utilizes UGC (or what they refer to as “chatter”). They also state that negative reviews and comical and defamation UGC of a brand, “negatively influences a firm's stock returns” (p. 213)

Though the trend of utilizing UGC is new, the trend of sharing stories is not. Word-of-mouth has always been a factor for transactional marketing but throughout history the opportunities for sharing experiences and opinions has changed. Though the voice of the customer was historically included in R&D (Denove & Power, 2017), Web 2.0 is now a space where people look for reviews and ideas of where to make their next purchase. According to Chris Denove and James D Power (2007) the best and most successful companies places the customers in the center of their strategy whether that is through taking in their ideas and opinions in innovation or using their own material through UGC.

The scale in which brands use UGC varies. It can be anything from strictly on social media and “re-posting” a customer’s image to placing UGC on every marketing channel. UGC can be used as any type of marketing material, for example, brands such as Spotify have used UGC on billboards around The United States of America (Warnock, 2017). Furthermore, Disney used it on their homepage to promote Disneyland and Make-A-Wish Foundation in addition to using

#ShareYourEars and asking their audience to upload images of themselves wearing the Mickey Mouse ears (worldwish.org, 2016).

Various sources discuss the best channels to place UGC and what they all agree on is channels where the customers make their purchase choices and where they find their inspiration. Olapic (2018), the leading business of the UGC industry suggests channels such as Instagram and Facebook, ecommerce homepage and product page. Instagram and Facebook are sites where consumers look for inspiration as well as information for any potential purchase. Looking for a summer dress? Have a look at what friends are wearing, ask their opinion, see pictures of the fit etc. An ecommerce homepage is the first page a customer enters when online shopping. By placing UGC on that page a brand can control the customer journey and UGC on a product page can be that extra push in order for a consumer to complete the purchase. If a consumer is uncertain of a product, unsure of the fit, what it would look like on a dark skinned/light skinned or similarly on someone with a different body shape, UGC offers a wide range of possibilities and promotes the authentic person rather than the “perfect” model.

3.1.8 Authentic Marketing

This brings us back to the importance of authentic marketing. With all the tools of Web 2.0 it becomes increasingly important to include the customer. Though UGC is viewed as a fairly new trend it has actually been around for a very long time but through more traditional channels such as radio, magazines and friendly encounters where people would share their stories and opinions about travels, products etc. The countless strategies within traditional advertising often aims to pitch a seemingly perfect product in order to persuade consumers to buy them. This intense way of marketing often left consumers overwhelmed and hesitant. When the perfect products turned out to be flawed customers started asking questions and became more critical on their purchases. This is also applicable to the way consumers view advertising and DeMers (2018) specifically explains that consumers “began to distrust advertising, and seeing most traditional ads as an indistinguishable blur of white noise”. DeMers (2018) also describes content marketing, and specifically authentic marketing from consumers, to be a lucrative alternative as it gives consumers real and more value. Parise and Guinan (2008) specifically argue that authenticity of a brand message is better perceived coming from other customers rather than from the brand itself. Mostly because the “controlled” message is not as widely accepted, due to a potential ulterior motive, then if it were to come from the customer.

According to Chabra (2005) “authenticity is considered a premium attribute and a means to attract tourist, as well as customers. But rather being a tangible asset, it is “value” placed on a product by its observers. Gilmore and Pine (2007) on the other hand argue that authenticity is defined in experiences along two dimensions (1) whether the provider and product/ experience are true to themselves and (2) whether the products and experience are what they claim to be in relation to others. Then there are other scholars such as Taylor (2001) and Reville and Dodd (2003) who argue that authenticity is the way brands present the products. Brands market commodity products with “authentic qualities” and claim them to be exclusive or expensive. It is not necessarily authenticity itself that is essential to demand but rather that products are marketed authentically as those products are then perceived as a higher quality product and better value for money (Lewis & Bridger 2000).

MacCannell (1999) states that as society develops and becomes more homogeneous, consumers look to what is most valued to them. For example, traditions, heritage and they constantly seeking connections to their own life and looking for marketing which is closely connected to social proof (Engeset & Elvekrok, 2014). Social proof dictates that a person’s nature is to look for explanation, information and second opinions. This related back to what Shirky (2011) describes as group action. Consumers looks to their network and follow social trends, therefore instigating group action. This is why media and marketing content published by brands should be in line with what consumers are looking for. Zottolla (2018) provide a powerful statement from the consumer's point of view “we want to work with and buy from organizations that are truthful, genuine and dependable”.

3.1.9 Honesty

As marketing strategies has changed and as stated in the information above, authentic marketing is essential for any consumer brand due to the ever-changing customer demands and social trends. Similarly, it is known that brands and businesses are not always honest about what goes on behind the scenes. Chief Marketing Officer Ashley Deibert (2017) suggests that brands and businesses should not be afraid to be honest with their consumers and explain to them if the brand is undergoing change, humanizing or adding/taking away products as it instigates a mutual respect and can strengthen the customer/brand relationship.

3.1.10 Literature Review Summary

Technology and digitalization have not only developed the business landscape but it has changed how the consumer communicates, behaves and how they purchase products. The consumer is constantly exposed to product marketing through various channels (Kotler, Kartajaya & Setiawan, 2017). It has allowed the consumers to be more critical of their purchases and research similar products from other sites and brands. Digitalization has also provided opportunities to how we reach competitive advantage, one of them being placing the consumer in the center of marketing and product development (Neises, 2013). The literature review has gone through various stages of UGC, moving from digitalization and how exponential growth (Brynyolfsson & McAfee, 2014) is the reason why technology is where it is today to honesty which describes the mentality brands needs to adopt in order to retain and grow their customer base.

3.2 Literature Analysis

The following literature analysis aims to answer the question “How did the User Generated Content trend develop and what factors affected its development?” and fulfill sub purpose A; “Analyze academic literature in order to unravel UGC and support the empirical data” from Chapter 1. The aim is to pinpoint certain trends which are keys in the development of UGC and its key role in digital marketing.

3.2.1 Key Insights

It is safe to assume that brands have, with the development of technology, seized the opportunity to use digital marketing as a key strategic tool in order to become more successful. Due to the rapid increase of technology it is not surprising that academic research shows the increase of trends such as UGC. This becomes specifically apparent when looking at the ever-growing research done on UGC as well as how consumers are getting more involved in the marketing process. For example, consumers are becoming more involved in marketing, as Neises (2013) three phases explains. There is a clear development between phase one and phase three. The knowledge stated in the literature review also shows how digitalization has led companies to lead a business with less assumptions and fewer subjective forecasts due to data.

Businesses are driven by data, more specifically data gained from Customer Relationship Management Tools (CRM). With CRM tools, any strategic decision is influenced and made by looking at what that data states. For example, what time of the day consumers are online shopping, what products they look at the most, what age group and so on (Schubert & Kosh, 2002). During the gathering of information for this thesis, it was clear that there are many factors to the UGC phenomena and within the literature review there were a few key insights which had not been considered before conducting this study. More specifically, there were key insights which had not been considered to be major factors to UGC, affecting its development, popularity and more. Therefore, it warranted a discussion section of its own.

To ensure a structured answer to the first research question, the following section will be dedicated to discussing key insights and how these insights affect and affected UGC. That section will be followed by a subsection discussing the stages of development of UGC and identifiable trends throughout the literature review. The key insights and factors affecting UGC, which will be discussed further are; hard data, atomization, authenticity and customer collaboration.

Throughout the literature review, hard data is frequently mentioned; in digitalization, customer collaboration, customer experience, UGC and more. As it is frequently mentioned, one can draw the conclusion that hard data is key in business and a lot of the strategic decisions are based on what the data says. Data provides information on various aspects of a business, not to mention its profitability and return on investment (ROI). It was never considered that hard data was a major factor in why UGC became such a significant trend because UGC is about images and not numbers. Due to the existence of the UGC industry and affiliate companies who provide services to streamline the UGC process, brands are more likely to adopt the trend because they have access to data. The affiliate companies provide data on important performance numbers such as conversion rates, click through rates, ROI, website traffic etc. which all contribute to how well a company is doing. Were these number not attainable, brands would probably not know, in as much detail, whether including UGC in their business strategy would be beneficial or detrimental to their company. Similarly, brands, with the help of data, can determine to how to use that data and where, how and to whom publish the UGC. There are also so many layers to data, there is data on how the company is doing on a more MACRO level and there is MICRO which determined how, where, to whom and what data to send out. Data has been interacted to

deeply into a brand that brands depend on technology and data from CRM in order to run a successful business.

Atomization is another major aspect of UGC. With harsher regulations in place such as data rights, copyright etc. it is not so simple to just go online and download a picture which fits the brand aesthetic. If it was, it would still be a lot of manual labor for one simple image and hardly worth the time because it would have to be done for multiple images. Due to digitalization, automation is a major aspect of any business, not only in terms of UGC but of employee processes, communication, salaries and more. Within UGC, affiliate companies' such as Olapic (Olapic, 2019) helps brands to choose images, ask for rights, tag brand products and upload it online in an automated way and within seconds, instead of spending hours and days trying to gain rights and uploading it to the ecommerce site.

If it wasn't for automatization, UGC would be a full-time job and one could argue that without the help of atomization it would have been difficult for the UGC trend to grow so substantially as it has in the past few years. UGC was also heavily impacted by various laws and regulations, such as General Data Protection Regulation (GDPR) and due to machine learning and being able to automizing processes, the UGC trend and industry was able to keep growing.

Authenticity, it is an interesting topic as so much now revolves around the materialistic nature of appearance. Social media has become a site for both activists as well as promotion of certain beauty standards. On one hand there are those who fight against beauty standard and believe in a more "natural" looking body. Then there are those who abide or try to abide by the standards set by society and social media, though this trend is declining as we now see the tall, skinny model standard being altered and now anyone can become a model. It is an interesting point to make because we see more diversity on today's fashion runways. There is more diversity in a model's body, skin type, height etc., showing a wider range of models, a more authentic representation of the human race. The use of UGC has therefore also developed and a more authentic market online, especially for ecommerce. Essentially, socially and commercially, society seems to be moving towards a more accepting an authentic nature.

Despite the increasing model diversity, the role fashion brands play in the fight between natural and unrealistic beauty standards is crucial due to the spread and affect social media has on young adults. The world is so connected by technology and many young individuals post

images on social media of their bodies, various daring outfits, various popular brands and more. Social media quickly become a place of comparison.

UGC developed so incredibly fast, it was also, arguably, ahead of its time as the model industry were still only using a specific body type and certain standards. Therefore, there are some elements where the model industry standards affected UGC and social media posts. For example, uploading on social media became popular very fast and young adults wanted to portray this illusion of adhering to model standards and therefore using technological tools in order to modify the pictures. It has led us to relate to a theory by Jean Baudrillard (1992) who argues that the use and abundance of social media and the media on sites of web 2.0 have shaped and altered authentic experiences. Baudrillard also argues that reality is only understood when re-created online creating a culture where individuals cannot distinguish what is real and what is not. The question is, how much did the model industry impact UGC and what is being posted online before diversity and authenticity became a trend? This would require more in-depth research. Though there is no doubt that authenticity is a major factor of UGC and consumers are clearly looking for inspiration they can relate to (DeMers, 2018).

With authenticity and providing content of consumers comes customer collaboration. Any previous knowledge of customer collaboration was related to how a customer works with a business however, the literature review gave a deeper insight to how different and crucial it actually is to digital marketing. From the literature review one can conclude that customer collaboration has developed in three key phases according to Neises (2013). These phases are described quite generally and more one could argue is closely related to product development rather than collaborative marketing. It lacks some detail as the first phase is so distinctly different from the third phase. Although, this can be explained from the speed in which technology has developed and how technology has revolutionized the customer's role in product development and marketing. Nonetheless, it has given an insight into how fast customer collaboration has developed. Because customer collaboration was already an important factor of innovation and product development, it was almost natural to support UGC and affect its development and its popularity. The customer becomes more involved and feels appreciated by having their images used by their favorite brands. It has almost become a natural way of closing the gap even further between the consumer and the brand.

The literature review outlines many benefits of using the customer as a co-collaborator and generating a co-creation of value. It also shows how many parts of the business it actually reaches, such as data, strategy, revenue, customer targeting and more. To deliberate, an example would be how a brand can, by getting to know their consumers' demands and preferences, be able to construct a product-making strategy that makes the products and services match the consumers' wishes as well as take care of their concerns. Brands will also be able to produce a marketing strategy with a much wider reach, capturing enough attention from the audiences as well as raise their interests and willingness to complete a purchase. Customer collaboration can also aid in streamlining processes, producing more innovative and groundbreaking products. It is no wonder the UGC trend has been placed in the center of business marketing. It not only publicly shows that a brand is working together with the customer to create content and that they care about their opinion but it shows that the company is in the forefront of digitalization and industry development. This is increasingly discussed by DeMers, 2018.

3.2.2 The Unravelling of UGC

The following section of this chapter is aimed at discussing the stages development of the UGC trend. It is an additional section in order to the first research question of the study "How did the User Generated Content trend develop and what factors affected its development?". In order present a detailed and structured theme and development process of UGC, five phases have been designed to show the crucial steps in the development of the UGC trend. The key insights and factors of UGC will also be discussed accordingly and throughout.

These phases represent a subjective opinion and serve as a timeline starting with the development of technology to the presentation of hard data. The phases are also based on the literature review as a whole rather than a summary of each individual topic.

Phase 1: Development of technology

The revolution that is digitalization, as Clay Shirky (2008) explains it, has changed the way companies and fashion brands do business. It has not only enhanced, automated and streamlined procedures, processes and internal communication but it has also opened up endless opportunities for brands to gain a competitive advantage. Digitalization and the development of technology has also allowed the masses to be more critical and be more opinionated about

their purchases, their choices and their values. Therefore, the importance of for example authenticity, hard data and co-creation of value is increasing. As demands and opinions grow, the industries need to meet new expectations every day.

Due to the exponential growth of technology which is discussed by Brynjolfsson and McAfee (2014) it is almost impossible to identify what the future will look like for competitive advantage as there are new inventions and new technological development every day. However, it is safe to assume that the UGC trend would not be in existence if digitalization was not a fact and it would not be growing as fast as it has been. The future of UGC could be discussed in relation to Jean Baudrillard (1992) theory of hyper realism which was discussed in the previous section. Perhaps society and the reality of social standards and body image will influence the UGC negatively and will therefore not be as big in the future. However, this would require further research. It was only 11 years ago when Clay Shirky (2008) predicted the use of UGC and the interplay between the existing institutions and new arising platforms and gives us a rough image on how fast the industry is growing. This leads us to the participatory internet and sites of Web 2.0 (O'Reilly, 2009).

Phase 2: The participatory internet

The sites which O'Reilly (2009) refers to as the sites of Web 2.0 is a crucial phase in the buildup of the UGC trend. Without the creation of participatory sites such as Facebook and Instagram there would be no platforms in which individuals can share images, information, gossip or communicate, besides the traditional telephone calls or letter mail. Sites of web 2.0 create spaces where people can easily connect with anyone in the world, share their thoughts, feelings and memories of their lives. These participatory sites started out as being for the individual but has now developed to a strategic space for companies and brands to grow and develop due to the wide range of functionalities of these sites. It changed the rules of how brands promote themselves, how marketing is spread and how companies communicate with their customers. It again goes back to the exponential growth which can explain why media focused sites such as Facebook and Instagram became global billion-dollar companies within ten years (Edosomwan et al. 2011). But having these sites for communication and sharing are not enough if specific social trends aren't created.

Phase 3: Sharing of Information

The increasing popularity of Web 2.0 sites such as Facebook and Instagram instigated group action, explained by Clay Shirky (2008). It discusses how, as more people started sharing on social media and talking about social media, the more people started sharing and therefore making it more popular and a social trend. People were able to actually share every detail of their lives as well as their opinions via text, media, shares and likes. Because the internet is so widespread and connected to everyone in the world, the sharing was available to anyone with an internet connection. People were keen to show their life and their experiences through media.

Discussing this in terms of brands, Facebook, Instagram, Pinterest and many other social media platforms actually break the limits of their national territory and offers individuals the opportunity to work with brands in any country, no matter the distance between them. For example, a person in Sweden can upload an image or share his/her comments on a product with a brand situated in Australia. Borders are not necessarily an issue for brands in most countries, therefore the information and media can be collected from almost anyone, anywhere in the world. Due to its spread and how it made borders irrelevant, the sharing of information is a crucial stage in the development of UGC.

Again, due to exponential growth of technology social media sites were able to keep streamlining and automating processes for sharing, liking and commenting. Making it increasingly popular to participate in those actions and for people to keep posting images and videos online therefore, sharing information. When millions of people were spending hours a day on social media, of course brands and companies would take the opportunity to market their business and products on these sites. Literature distinctly discusses this as the first few steps in how customer collaboration through UGC became so important.

Phase 4: The Potential of User Generated Content

In Neises (2013) three phases of collaborative marketing, the second and third phase is when we notice the change in focus. Brands and companies start utilizing technology and specifically social media to promote and spread awareness. It is also where brands start placing the customer in the center of their strategy. Because the customers are now in focus and the social trends are changing it was important for brands to follow these trends. Specifically, for fashion brands. As customers were now critical of the tall, skinny and unattainable model for women and tall, muscly and overly masculine model for men, brands needed to be more versatile and market to

their actual customer, no matter the body type. Therefore, the social trend of sharing images and hash tagging brands were a great opportunity for brands to gain more marketing material. It also gave brands an opportunity to build a relationship with their customers.

The research clearly showed a shift in brand marketing during the introduction of social media which meant people were looking for inspiration not from models but rather from their friends and family. Somehow the combination of social media, digitalization and group action created this great trend, and according to Kumar and Jhala (2017) using customer images is more cost-friendly compared to traditional methods of marketing. As customer collaboration was growing, the path from working with customer centric product development to actually using customer images, was not that long.

As the UGC trend was developing and establishing itself in the consumer market a new industry was created. This industry consists of technology companies who help brands to maximize their use of UGC by collecting UGC from social media, asking consumers for rights, placing it on brand homepage, tag products and produce performance data. Companies such as Olapic. It is an industry which can help brands to streamline the harnessing of social media content. It also offers brands with strategy, best practices and essentially help brands to become successful.

By utilizing customers images and a potential affiliate UGC company (made possible through digitalization), brands can easily dedicate more time to other matters. It was clear, from the information in the literature review that UGC is not only more cost efficient but it also means less physical labor and offering more free time to advocate volume of products and services and optimizing other aspects of the business.

Phase 5: Producing the numbers

Another aspect of UGC which has contributed to its increased implementation into brand strategy is the ability to produce data on performance. Data has an immense importance when it comes to making decisions at a company and by being able to produce numbers on how the UGC content is performing is very beneficial in decisions whether to use this content or not.

As there is data on how well UGC impact sales and online engagement there is also data which brands can use in order to optimize who, how, where and when they send out the UGC. As affiliate UGC companies have developed they are able to produce statistics on how the content

is performing. Facebook and Instagram have also developed tools which show users who is viewing their content, at what times, how long etc. Due to these tools' brands work with less assumptions and fewer subjective forecasts. Brands can easily read the data and determine how to build and adjust their strategy, what media to upload and when as well as who to target etc. With this information, a brand could set up a system to optimize performance for example through a scheduling system. A scheduling system would help brands to upload media at peak hours as well as be able to target specific regions, demographic and segments. The data would then again be able to show numbers on website traffic, consumer reach, impressions as well as categorize age groups, gender as well as personal interest. It almost becomes an iteration process in order to find the perfect digital marketing strategy. It would also be easier to present and show evidence on how UGC is actually beneficial or not beneficial to the brand.

The ability to produce such detailed numbers on performance is a result of exponential growth and due to the large role technology is placing, data often comes with it. One could argue that this is a potential fourth "phase" from Neises (2013) theory of marketing and customer collaboration.

As mentioned above Neises (2013) discusses three phases moving from no customer involvement to the third phase where technology is mentioned. Neises (2013) study was introduced in 2013 and there have been incredible changes in technology since then. The fourth phase, one might argue, would be the introduction of data and detailed insight into the individual consumers rather than looking at segments. With data, brands are able to target specific individuals and personalize each marketing material to them, making each customer feel special.

The production of numbers and statistics have hugely aided the trend of UGC and made sure that it is here to stay. Numbers in data also clearly shows that consumers want more authentic and honest material. By brands being able to meet these demands, it can hugely impact their key figures such as revenue.

3.2.3 Literature Analysis Summary

From the extensive research there were a few topics which had not been considered to be factors to the development of UGC or to have any major effect on the trend. These key insights were hard data, atomization, authenticity and customer collaboration. Though there was previous knowledge of these areas and some understanding to their connection to the phenomena, their role in the development of UGC were larger than first predicted. Although it probably should have been more expected, the extent of their affect was not contemplated. Looking back, these four areas are cornerstones to the second stage of this literature analysis, which was the phases of development.

Throughout the literature review and throughout the knowledge that was uncovered, the speed in which UGC and technology has developed is mentioned quite frequently. Not just by Brynjolfsson and McAfee (2014) but also by Neises (2013) and Shirkey (2008). There are many key scholars which throughout their academic publications, together, provide a timeline to how fast UGC development and how quickly it became a crucial element in marketing strategy. The subjective understanding of that development was presented through five phases. Together, the five phases almost project a timeline of the development of UGC. The five phases are as follows;

Phase 1: Development of technology

Phase 2: The participatory internet

Phase 3: Sharing of Information

Phase 5: Producing the numbers

4 Empirical Data

This chapter aims to present the empirical data as well as the findings from the comparative analysis of UK fashion brands in order to answer the second research question “Is there a noticeable systematic correlation between the use of UGC and whether a UK fashion brand is considered a top or a bottom brand?”. This chapter also aims to fulfill sub purpose B; to find the empirical data and identify any systematic correlation for UGC in UK fashion brands in 2019. The following table shows the empirical data results from the comparative analysis of top and bottom brands. The following table compiles the empirical data results and the answers from the observational survey in Google Forms.

Questions	Top 8 Companies	Bottom 8 Companies
Do they use UGC?	75%	50%
If yes, do they use UGC on Instagram?	100%	75%
If yes, do they use UGC on Facebook?	83.30%	25%
If yes, do they use UGC on homepage?	100%	50%
If yes, do they use UGC on product page?	50%	0%
If yes, do they use UGC on Favebook Ads?	0%	0%
Are they using regional frame for their Instagram audience?	0%	50%
Are they using national frame for their Instagram audience?	25%	12.50%
Are they using international frame for their Instagram audience?	75%	37.50%
Is the brand promoting a hashtag or @ on their homepage or social media account?	100%	37.50%
Are they using a UGC affiliate to streamline the UGC collection and publishing?	50%	0%

Table 2. Empirical Data Results (Top & Bottom Brands)

A quick summary of the results presented in Table 2. As one can see above, there is a clear indication that top fashion brands use UGC more broadly and more frequently. The data showed that 75% of top companies use UGC in their digital strategy. More specifically, these brands use UGC on at least three different marketing channels. They promote a hashtag as well as are actively communicating with their audience. The 25% who don't actively use UGC in their

strategy are still promoting a hashtag and have elements of a UGC strategy build up. To be clear, they are not using UGC images on the ecommerce site but are promoting a hashtag, regularly communicating with their consumer on social media etc. Out of the bottom fashion brands 50% of the companies are, according to our criteria, using UGC. However, it is important to note that they only have elements of it. Although this is a relatively high number the data actually showed that out of those four brands (50%) who “use” UGC, only one brand actively integrates UGC into their marketing strategy while the other three brands are purely using UGC for Instagram posts. The following sections will go through a deeper discussion as well as go through several distinctions between the top brands and the bottom brands to then bring them together in the conclusion.

4.1 Top Brands: Analysis Discussion

Looking at the top brands exclusively, there are a few interesting trends which are worth mentioning. As mentioned in the results summary, 75% of the top eight fashion brands use UGC although, interestingly the two brands who do not use UGC are borderline luxury brands. As we know, from the literature review, luxury fashion brands tend to be less inclined to use consumer images due to their branding standards and brand aesthetic. This could be an explanation for why these two brands are not using UGC. Majority of top fashion brands are using their social media presence on an international basis, widening their audience and potential reach. The companies with an international focus are brands who are at the top of the revenue list (see Table 1). The results also showed that a lot of younger brands are using UGC, for example Pretty Little Thing who is ranked number four amongst the top brands. The brand was only founded seven years ago. It is astounding to see how young brands, such as Pretty Little Thing can compete with internationally renowned brands such as French Connection who have been dominating the UK market for the past 20.

The data also showed a trend where even though the brand might not be using UGC they are still promoting a hashtag, indicating an ambition to grow on social media. It could also be a potential indication that it is a trend they want to incorporate into their strategy or they simply want to keep track of how many people actually post about their products.

As we know, harnessing UGC is a process and there are various companies which can be used in order to streamline this. The empirical data results showed that 50% of brands are using an affiliate company to maximize their UGC strategy. It shows a clear pattern that brands who already use UGC on at least three channels, promote a hashtag also invest in an affiliate company in order to streamline the UGC harnessing and publishing process. One could relate this to hard data and brands wanting to invest in an external company in order to gain a deeper insight into how to maximize their use of UGC and how to strategically use it in order to drive business growth. As we know, data is a major factor of business, and could therefore explain this pattern. There is also a big difference between a brand who uses an affiliate company versus those who do not. This is purely observational however it was clear that those brands who place UGC on their ecommerce site did not have a systematic way of driving their consumers to the right places in order to drive more sales. For example, those who use affiliate company have their UGC images tagged with a product, and making it “shoppable” and therefore simplify and shortening the customer journey, creating a better customer experience and therefore minimizing the risk of losing the consumers due to long check out process. The brands who do not use an affiliate company to help integrate UGC on marketing channels, place UGC with less structure and with minimal strategic positioning. Although placing UGC on multiple marketing channels enhances the customer experience, trying to purchase products from those images are not as simple or as clear as from those brands with streamlines process.

It is also important to highlight that all companies answered this question (if they were using an affiliate company or not) regardless whether they use UGC or not. Therefore, the data was not as clear as it might have been if the questions were structured to screen brands out of the survey. It did impact the results.

4.2 Bottom Brands: Analysis Discussion

According to the data, out of the eight bottom brands who were analyzed, four brands (50%) are using UGC. Although this is an unexpectedly high number there are some distinctions which can explain these numbers:

1. Out of the four brands, only two use UGC on other channels than on Instagram
2. They are distinctly younger than other bottom brands

If we were to have changed the criteria question to “Does the brand use UGC on other marketing channels than Instagram?” Then percentage of brands using UGC would be 25% instead of 50%. If we were to have gone through the same process for the top brands, the results would not have changed. It was also clear that the top brands use UGC very differently from the bottom brands. The top brands have UGC is integrated on several marketing channels, they have an international focus on Instagram, they all promote a hashtag etc.

The two brands who are using UGC and integrating it on other channels than Instagram are interestingly noticeably younger than those two who only use UGC on Instagram. It could be an indication that brands who embrace the UGC trend actually develop and grow much faster than those who don't. It also adheres to the understanding that younger brands are more open to embracing new trends as well as placing the consumer in the center of the strategy. As stated in the literature review UGC is a great option for younger brands who do not have a significant budget.

UGC is a great source of “authentic” marketing content and it is also free. It also allows the brand to communicate and build a relationship with their consumers. Compared to the top companies, the bottom brands tend to have a smaller social media audience. Firstly, only 62% are promoting a hashtag which indicates their level of focus on social media. Secondly, the brands who are actually promoting a hashtag are younger than those who do not. This also corroborates the statement that social media is used by younger brands as a strategic business tool in order to grow.

There is a clear distinction between the top and the bottom brands. Almost all the top brands use UGC in their marketing strategy, not purely for social media purposes. Out of the bottom brands, very few of the brands actually use UGC, but when they do, they only use it for social media content.

4.3 Chapter Summary

In conclusion, there is a clear correlation between how much UGC is used and whether a brand is listed as a top or a bottom brand. The empirical data of the bottom brands clearly shows that there is none or very little attempt to strategically using UGC. though there are elements of it, it is not used as strategically and as broadly as a majority of the top brands.

Some of the key patterns that are discussed above are; the relationship between young brands and the use of UGC, the absence of UGC in brands who are borderline luxury and top brands investment in affiliate companies in order to streamline the harnessing and publishing of content on marketing channels. The literature review provided a general understanding to UGC and explanations to some of the patterns that were identified. The literature analysis also provided a completer picture of how UGC has development and why for example younger brands are using UGC and investing in companies who can provide data for them. Implementing UGC could, arguably, be a strategic move in order to further develop the brand and gain competitive advantage.

5 Conclusion

After carefully looking at the empirical data and the literature, it is safe to assume that the trend of UGC is here to stay. Not only does customer collaboration increase with the use of customer images but it expands the potential for fashion brands. The vast knowledge from the literature review gave us a foundation for our empirical data section, both in terms of data collection as well as analysis. The combination of the two methods offered a broader topic of research and to investigate the trend of UGC. The following chapter will be dedicated to provide a clear answer to the research questions as well as discuss the two methods in relation to each other.

5.1 Research Questions Answered

5.1.1 Question 1

How did the User Generated Content trend develop and what factors affected its development?

The answer to the first research question; “How did the User Generated Content trend develop and what factors affected its development?” lies in the five phases discussed in the literature analysis. The phases are supported by key insight which discuss the affecting factors. The User Generated Knowledge trend was, based on academic knowledge, developed through a series of phases, these phases are: (1) development of technology, (2) participatory internet, (3) sharing of information, (4) the potential of user content, (5) producing the numbers. Without any of them UGC would not have existed today. The key insight discussed in relation to these phases were hard data, atomization, authenticity and customer collaboration. These are factors which affect UGC and heavily impact their popularity in the digital marketing landscape.

5.1.2 Question 2

Is there a noticeable systematic correlation between the use of UGC and whether a UK fashion brand is considered a top or a bottom brand?

The answer to our second research question “Is there a noticeable systematic correlation between the use of UGC and whether a UK fashion brand is considered a top or a bottom brand?” the answer is Yes. The majority of top brands use UGC in their digital strategy as well as promote a hashtag and invest in affiliate companies in order to help them make more strategic decisions and gain more data insights for their digital marketing.

Bottom brands show elements of UGC on their digital marketing channels however not close to the amount the top brands are. It could be an indication of not being mature enough or gambling on a wrong digital strategy but it is clear that UGC is being implemented on most fashion brands in the United Kingdom.

5.2 Knowledge and Data Discussion

By using a combination of a literature analysis and empirical data analysis, the study was broadened and a lot of the empirical data results could be explained by looking at the academic knowledge. For example, the only two top brands who were not using UGC were borderline luxury and as stated in the literature review, luxury brands tend to not adopt UGC (The Economist, 2014) due to wanting to keep to a certain brand aesthetic. Similarly, two of the top fashion brands, Misguided and pretty little thing, have extensive UGC strategy and are only 7 respectively 10 years old. Again, the literature informed us that young brands tend to adopt this trend because it is cheaper, requires less manual labor and provides more marketing content. Therefore, the data results we uncovered was expected due to the previous knowledge that we gained through the literature review.

The combination between literature review and empirical data also ensured that during the data collection, the right factors and right criteria was used when creating the list of fashion brands. Similarly, to know what observational questions to ask during analysis. For example, the

literature review gave us an insight into the importance of data and streamline processes. By asking that question and looking into a brand using an affiliate company, it is clear that top brands are more likely to use an affiliate company in order to streamline and to gain data and therefore being ahead of the competition. The combination of the literature review and empirical data was a great way to understand what to look for during analysis and explanation of trends as well as offered a deeper insight into what UGC strategy looks like in the UK fashion landscape in 2019. The future of UGC looks promising, as customer collaboration and authentic marketing grows the need for content and involving customers grow even larger. As research, we believe the trend is here to stay and is a skill which any aspiring marketing or business manager should learn.

5.3 Strength and Weaknesses of Research

This topic of research filled a gap in the general foundations of the User Generated Content trend. It does not only discuss the origin of the trend but supports the discussion with empirical data. This data offers background and numbers on what type of brands use UGC in today's marketing landscape. It is also a paper which will be relevant ten years from now to those looking to understand the foundations of UGC and what factors affected it in order to potentially understand its future.

Another strength would be that as researchers we have very different experiences of UGC and have incorporated a diverse group of topics to discuss. As two different researchers with different backgrounds our combined views make for a broader more established research.

Though the empirical data from the comparative analysis strengthens the value of the thesis it is also in the empirical data there are some shortcomings. Though the list was created based on the knowledge gained from the literature review and where the criteria questions were established, some of the questions (refer to appendix A) were irrelevant and difficult to incorporate and present into the analysis and presentation of data. The empirical data could have been strengthened by having more detailed questions and follow up questions. It is mentioned in the discussion as the numbers appear to be a lot higher, specifically for the bottom brands, than they actually are.

Additionally, the comparative analysis is based on observation, the paper could have been strengthened by actually speaking to the brand itself however as mentioned in the methodology brands view competitive advantage and success in various ways and would have made for a very lengthy and confusing paper.

5.4 Future Research

The purpose of this study was to establish a foundation for UGC trend, report on how UGC is established in the UK fashion market in 2019 and to discuss affecting factors of the phenomenon. It also serves as an academic foundation for future research of new trends or if the UGC trend evolve into something we have yet to discover.

In terms of future research, there are a few opportunities which could be researched further. For example, the empirical data could be strengthened with the thoughts and opinions of the actual brands rather than being based on observation. One could also take this research and conduct a similar study with a different demographical focus, such as the USA for example and do a comparative analysis of geographical location. It would give a deeper insight into culture and national social trends and how strategies might vary depending on where the brand is from and what demographic it targets. Similarly, a study could be conducted on a different industry and compare various industries and how broadly they use UGC. There is also mention of how UGC was impacted by the modelling industry, how that might have an effect of its future development.

Finally, this research documents the present, the future of UGC has not been discussed in detail and if one were to conduct a study for the future of UGC or content marketing this research study could be used as a foundation to understand its development and its reality in 2019.

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7 Appendix A (Survey Questions)

1. Is this brand categorised as top or bottom?

Mark only one oval.

- Top eight
 Bottom eight

2. Do they use User Generated Content (UGC)?

Mark only one oval.

- Yes
 No

3. If "Yes", do they use UGC on the following places? (Tick all that apply)

Check all that apply.

- Instagram
 Facebook
 Homepage
 Product Page
 Facebook Ads

4. How large is their Instagram following?

5. What frame do they use for their Instagram Audience

Check all that apply.

- Regional
 National
 International/country

6. Is the brand promoting a hashtag or @mention on their homepage or social media account to generate more customer content?

Mark only one oval.

- Yes
 No

7. How many pictures does the brand have under their main hashtag?

8. **Are they using a UGC affiliate company to streamline UGC collection and publishing?**

Mark only one oval.

Yes

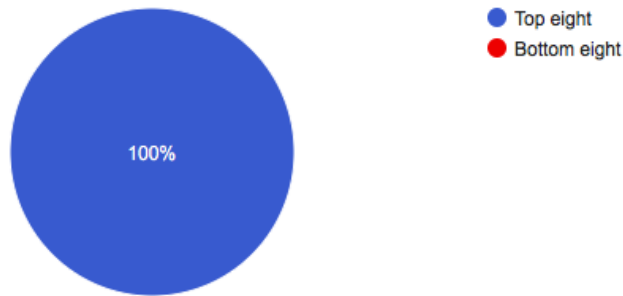
No

8 Appendix B (Data Results Diagrams)

8.1 Top Brands Results

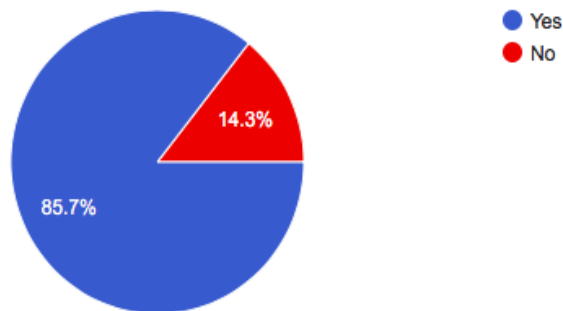
Is this brand categorised as top or bottom?

7 responses



Do they use User Generated Content (UGC)?

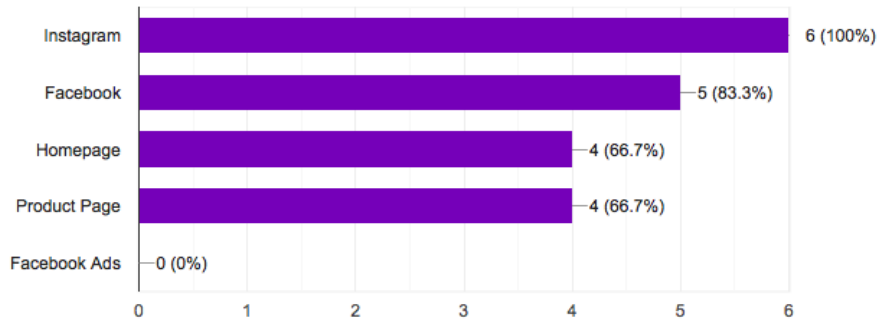
7 responses



If "Yes", do they use UGC on the following places? (Tick all that apply)

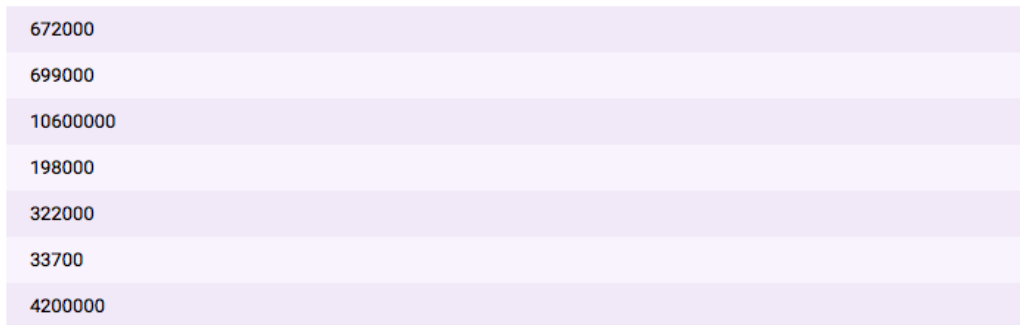


6 responses



How large is their Instagram following?

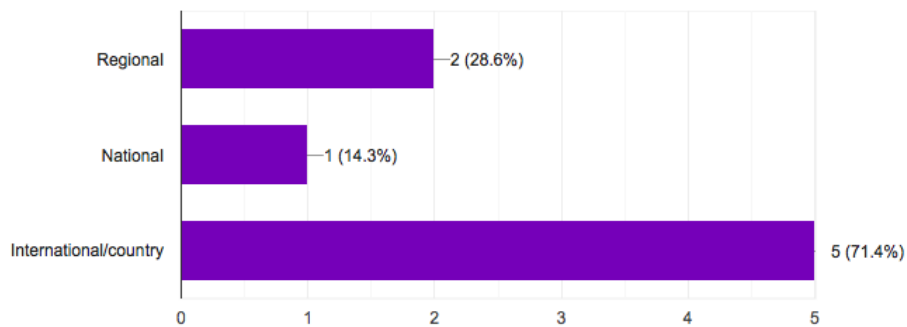
7 responses



What frame do they use for their Instagram Audience

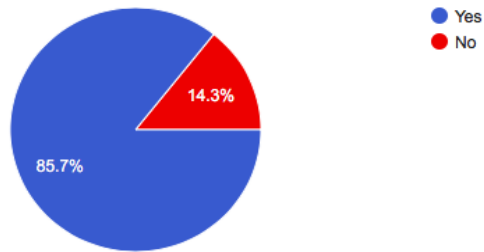


7 responses



Is the brand promoting a hashtag or @mention on their homepage or social media account to generate more customer content?

7 responses



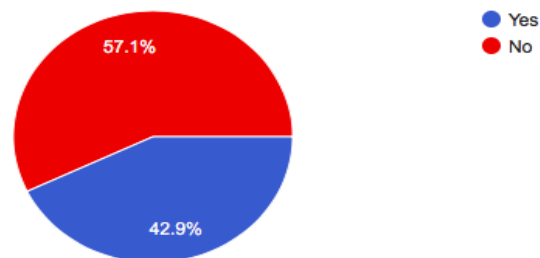
How many pictures does the brand have under their main hashtag?

7 responses

1514936
421991
1340478
93622
805769
13545
530087

Are they using a UGC affiliate company to streamline UGC collection and publishing?

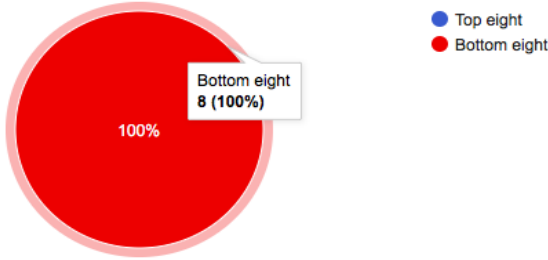
7 responses



8.2 Bottom Brands Results

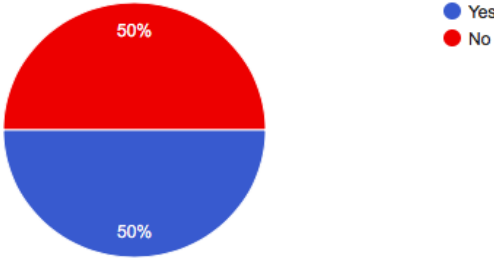
Is this brand categorised as top or bottom?

8 responses



Do they use User Generated Content (UGC)?

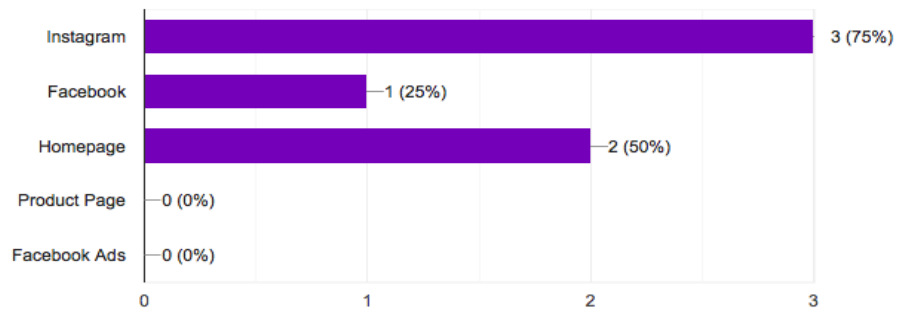
8 responses



If "Yes", do they use UGC on the following places? (Tick all that apply)

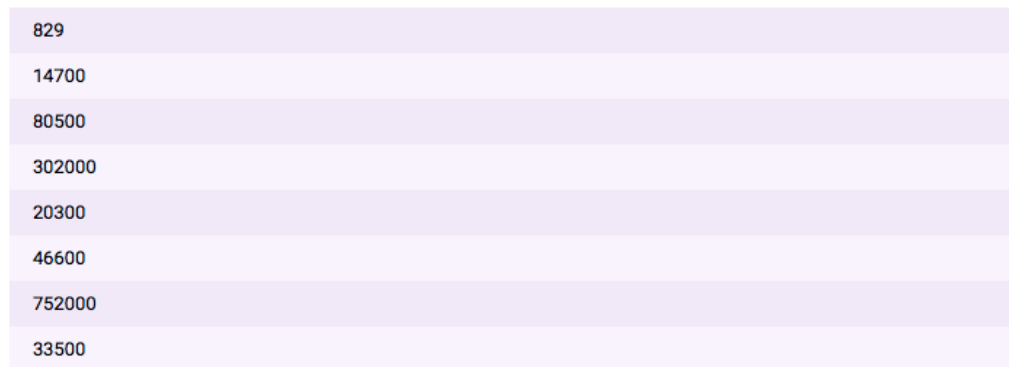


4 responses



How large is their Instagram following?

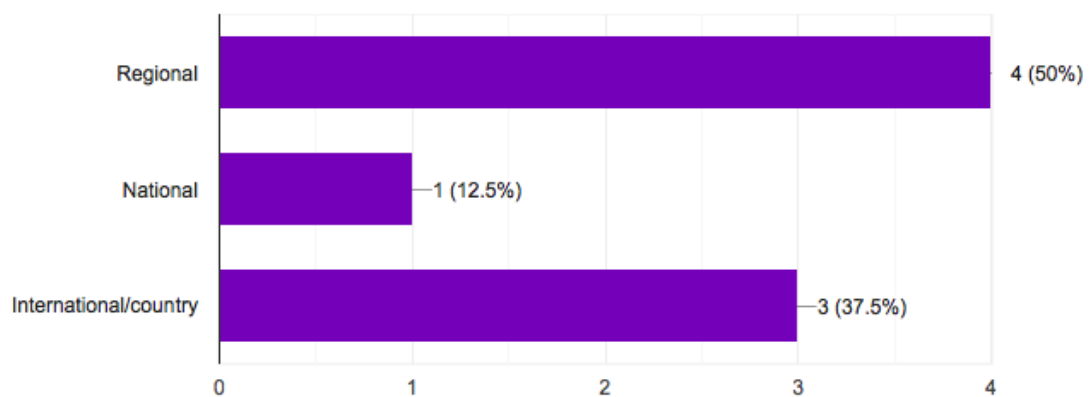
8 responses



What frame do they use for their Instagram Audience

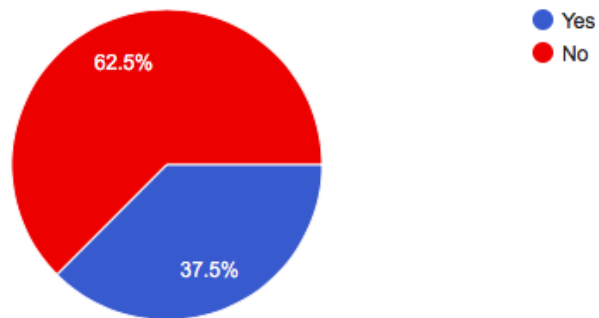


8 responses



Is the brand promoting a hashtag or @mention on their homepage or social media account to generate more customer content?

8 responses



How many pictures does the brand have under their main hashtag?

7 responses

1740
158799
69611
87449
38887
7638993
1541

Are they using a UGC affiliate company to streamline UGC collection and publishing?



8 responses

