VISITOR INTERNATIONAL BROCHURE DISTRIBUTION RESEARCH - SUMMER 2018

VISITOR International

The International Association of Visitor Information Providers

Summary Report Key Findings

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Visitor International Brochure Distribution Research for Visitor International - Summer 2018

A Summary of Key Findings

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Methodology

Bentley University, Center for Marketing Technology, created a survey in collaboration with Visitor International to understand the effectiveness of tourism brochures during June and July 2018. 17 locations were selected in the North America and Europe and 2.020 visitors responded to the survey. Professional marketers interviewed participants in situ and their survey answers were collated and sent to the Center for Marketing Technology for independent data entry, analysis and insight.

Important Respondent Characteristics

The majority of visitors travelled as tourists and had stopped at a tourist location for vacation, personal enjoyment and interest. In 2018, leisure travelers remained stable, 84% of tourists were visiting for leisure (slightly down from 86 % 2 years ago). Women were much more likely than men to be travelling for leisure than business, but almost equally split if combining business with pleasure. (See Figure1)

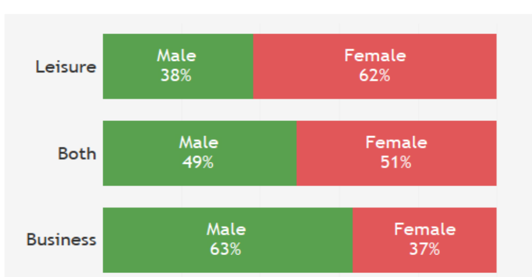

Figure1

It has been recorded in previous surveys that women are often the decision makers on trips, so it is valuable to observe that women are 3.4% more likely to use a brochure at a destination than men. (See Figure2)

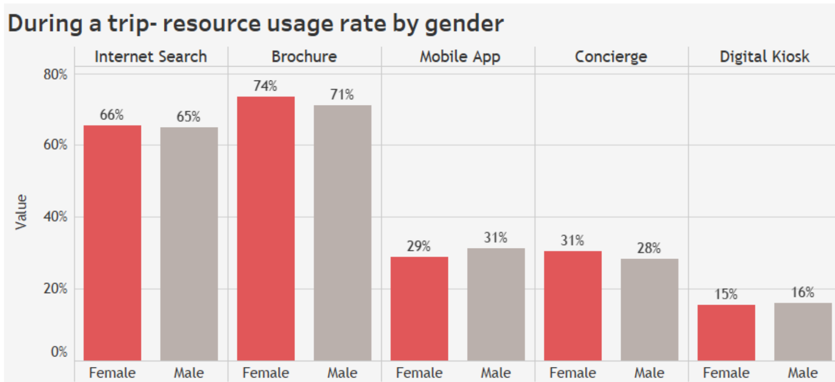

Figure2

The largest age group of visitors fall into the 45-54 category (21.3%) and the second largest age group is 25-34 (20.1%). There is a large increase in visitors picking up brochures on their trip (up from 67% to 79%) and we continue to see women more likely than men to select brochures and share the content with their friends or companion/partners. The age range of brochure users is significant with 68% of 18-24 age group using brochures, increasing to 80% for over 65s, reinforcing the insight that 'digital natives' continue to appreciate printed brochures for information. Focusing specifically on Millennials (25-34), it is useful to note the similarities and differences about brochure usage compared with other age groups. In general, Millennials (25-34) have similar use of brochures as other age groups when planning trips and on location. The principal difference is in use of social media, which Millennials (25-34) favor second to Internet search, but only slightly ahead of brochures. (See Figure3)

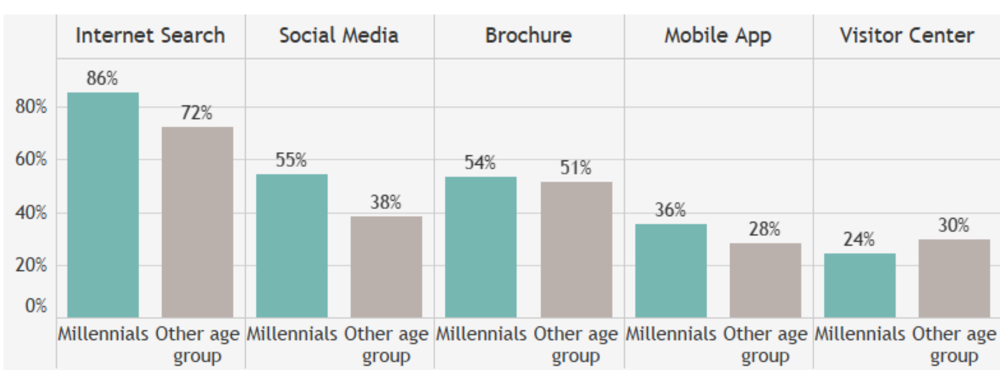

Figure3

Brochures are Second Most Used Planning Resource for a Trip

In a digital society it is not surprising that the Internet continues to provide the primary source of information for tourists planning a trip. Ranking 2nd as a pre-trip influence and representing over half of all visitors (52%) reported they also used printed brochures, maps and travel guides to help plan a visit, which remains consistent with 2016. While digital content and printed brochures dominate the planning experience, we are seeing a decline in the rankings of other media and visitor centers to influence the planning process. (See Figure4)

Resource usage rate for planning a trip in 2018

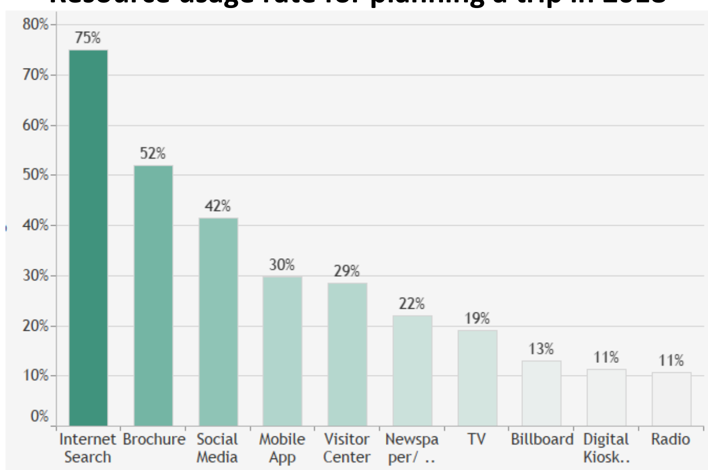

Figure4

This suggests that trip planners are influenced by omni-channel marketing approaches combining print, web and mobile content, more than traditional media.

Brochures Increase their Influence as #1 In-Market Source During a Trip

The most important source of information for a visitor during their trip is a brochure, map or travel guide. The influence of brochures from a display stand (73%) has increased ahead of web sites (65%) when a tourist arrives at their destination. (See Figure5) The web has slightly declined in importance as mobile apps increase in usage (30%). (See Figure6)

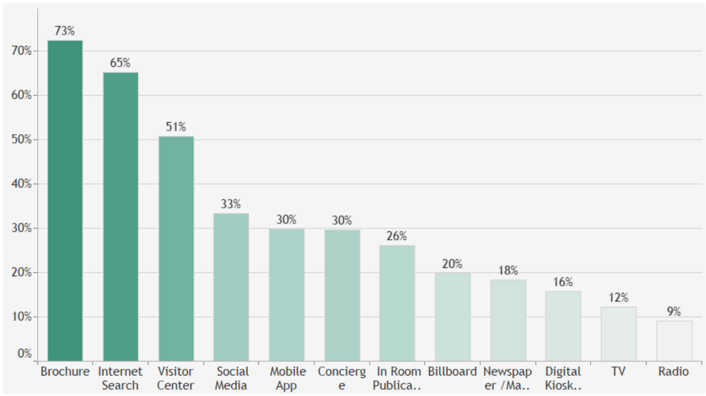

Figure5

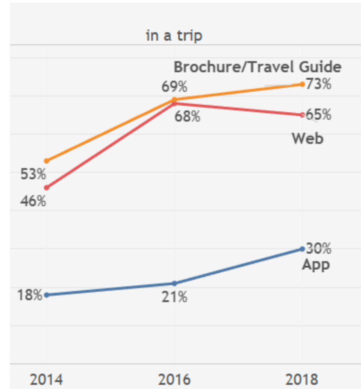

Figure6

Consistent with the ***January 2016 Bentley/Visitor International Hospitality Study*** tourists value the location of brochure racks and content promoting local attractions located in hotels, followed by visitor centers and destination attractions. An interesting insight is that local residents are more likely to visit a local visitor center (61%) than an out-of-towner (51%)to find out about things to do in their city. This gap widens when you compare residents' visits and use of brochures (59%) at local attractions compared to tourists (43%). Hospitality and Tourism Marketers that ignore the local population are missing a major opportunity to attract locals to local attractions and events.

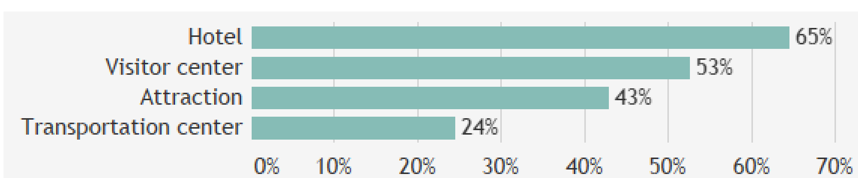

Figure7

Top Ten Ways Brochures Positively Impact Visitors During a Trip

1. 4 out of 5 visitors picked up a brochure during their trip (79%)
2. 3 out of 4 visitors were influenced by a brochure in market at their destination (73%)
3. More than 4 out of 5 visitors became aware of an attraction or business as a result of picking up a brochure (85%)
4. Nearly 3 out of 4 visitors would consider altering their plans because of a brochure (73%)
5. More than 3 out of 5 visitors planned to purchase tickets or merchandise they learned about from a brochure (61%)
6. More than 5 out of 10 visitors value information about current exhibits, events and attraction, particularly women (54%)
7. More than 5 out of 10 visitors find brochures to be a tangible, easy to use hard copy of information (54%)
8. Over half of visitors believe brochures are trustworthy (54%)
9. Nearly half of visitors appreciate that brochures are convenient and always available (48%)
10. Half of visitors' value discounts and coupons in brochures, particularly if they are travelling with a group (50%)

Brochures are a Shared Resource

More than 3 in 10 visitors value brochures because they are easy to share (35%) with friends and family on the trip. Printed brochures are more easily shared than digital information, which we see on our private screens. An interesting note is that the groups most interested in "easy to share" are younger or older than the typical family group led by an adult, aged 35-44, which still remains at 31%. A possible explanation is that the most democratic travelling parties are those without families in tow, requiring a greater shared commitment to a plan of action. Out of the 1605 visitors who picked up a brochure:

Nearly 1 in 50 shared a brochure with 0 people (1.8%)

Nearly 6 in 10 shared a brochure with 1-2 people (56.9%)

Nearly 3 in 10 shared a brochure with 3-4 people (30.7%)

Nearly 1 in 10 shared a brochure with 5+ people (10.6%)

For participants that picked up a brochure during a trip, each people share brochures with 2.5 members on average. i.e. The average distribution reach of a printed brochure is 3.5 readers per brochure. The implications for shared content can lead attractions to think more closely about shared experiences and group pricing.

Use of Brochures – the Visitor's Content Journey is Changing

Printed tourism brochures, display stands and hospitality in room publications continue to play a major role to influence visitor behavior - where they go, what they see and what visitors choose to experience.

The use of brochures remains constant as a pre-trip planning tool, but significantly the use of brochures on location, within a trip, continues to rise from a usage rate of 53% in 2014 to 69% in 2016 and now at 73% in 2018. The value of printed material in the multi touch, omni-channel world tourists inhabit today is clearly shown in this research. Local attractions and businesses should pay close attention not only to out of town tourists but also residents from the same city and suburbs. An impressive 91% of locals learn about attractions in their home city and 74% of them plan to purchase something - a nearly 20% increase in planned spending compared with tourists. It is evident that brochures add value to locals, tourists and merchants at their destination.

The longitudinal insights from Visitor International surveys over the past 12 years demonstrate more choices for content, delivery and convenience to help visitors plan trips and choose experiences at destinations around the world. This presents a complex marketing challenge for tourism marketers and while the influence of printed material in influencing visitors' behavior in market continues to grow a change in the direct correlation between printed content and purchasing actions can also be seen from the results of the 2018 research study. The primacy of women in decision making roles during trips also suggests marketers should ensure content is attractive to female readers.

In attempting to understand the change in consumer behavior and the impact of print and digital visitor marketing materials one must be aware of the increase in mobile and web-enabled devices that can be used in conjunction with printed materials. It is possible to see a connection between the influence of print and the immediate action and resulting satisfaction of purchasing goods, tickets to an experience, learning more through a mobile app or web site. There are more marketing touch points in 2018 that influence the visitor during their consumer journey and there is a complex interaction between thought and action for every visitor. What is clear is that in an increasingly multi touch world printed brochures and digital content must be designed to work together to drive awareness, consideration and purchase, both pre –trip and on location. On location printed material is #1.

Bentley University | International Visitor Information Survey

Every 2 years Bentley University in Waltham, Massachusetts collaborates with the global tourism industry to survey the attitudes and behaviors of tourists in cities around the world. Please help us with our 2018 study by answering this brief survey. Your answers are completely confidential. Thank you for your participation.

1) Which of the following resources helped you ***plan*** your trip? ***Please check ALL that apply.***

	Influence	Did Not Influence
Brochure / Map / Travel Guide	○	○
Visitor Center	○	○
Internet Search	○	○
Newspaper / Magazine	○	○
TV	○	○
Radio	○	○
Billboard	○	○
Mobile App	○	○
Digital Kiosk/ Touch Screen	○	○
Social Media	○	○
Others, please specify ______________	○	○

2) ***Now that you have arrived*** at your destination, which resources influence your activities at this location? ***Please check ALL that apply***

	Influence	Did Not Influence
Brochure / Map / Travel Guide	○	○
Visitor Center	○	○
Internet Search	○	○
Newspaper / Magazine	○	○
TV	○	○
Radio	○	○
Billboard	○	○
Mobile App	○	○
Digital Kiosk/ Touch Screen	○	○
Social Media	○	○
In Room Publication	○	○
Concierge	○	○
Other, please specify __________________	○	○

3) Now that you have arrived at your destination, at any time during this trip have you picked up a brochure, visitor map or travel guide?

○ Yes ○ No – Skip To Question 11

4) During your trip, did you pick up printed visitor information (map, brochure, guides) at any of the following locations? Check ALL that apply.

▢ Hotel
▢ Attraction
▢ Visitor center
▢ Transportation center
▢ All of the above
▢ Other____________

5) Did a printed brochure, visitor map or travel guide make you aware of a service or attraction?

○ Yes ○ No

6) Are you planning to visit a business or attraction that you saw in a printed brochure, visitor map or travel guide?

○ Yes ○ No

7) Might you alter your plans as a result of picking up a brochure?

○ Yes ○ No

8) Do you plan to purchase tickets or merchandise for businesses you learned about from a printed brochure, visitor map or travel guide?

○ Yes ○ No

9) How many members of your group did you share your printed brochure information with?

○ 1 – 2 ○ 3 – 4 ○ 5 +

10) What do you value about brochures? ***Please check ALL that apply***

☐ Trustworthy visitor information
☐ Tangible, easy to use hard copy information
☐ Information about current exhibits, events, or attractions
☐ Information about discounts or coupons
☐ Convenient and always available
☐ Easy to share
☐ Other ________________________________

11) What is the primary purpose of your trip?

○Leisure ○Business ○Both

12) What gender do you identify with?

○ Male ○ Female

13) How old are you?

○ 18 – 24 ○ 25 - 34 ○ 35 - 44 ○ 45 - 54 ○ 55 – 64 ○ 65 +

14) How would you describe yourself?

○ Tourist or Visitor ○ Local Resident

15) Which city are you currently in?

Country __________ City___________

Thank you for taking this survey.