

VISITOR INTERNATIONAL BROCHURE DISTRIBUTION RESEARCH
SUMMER 2016



The International Association of
Visitor Information Providers

Summary Report Key Findings

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Visitor International Brochure Distribution Research for IAVIP
Summer 2016
A Summary of Key Findings
Professor Ian Cross, Director of the Center for Marketing Technology
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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 2016. 17 locations were selected in the North America, Europe and South Africa and 1,732 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 and analysis.

Important Respondent Characteristics

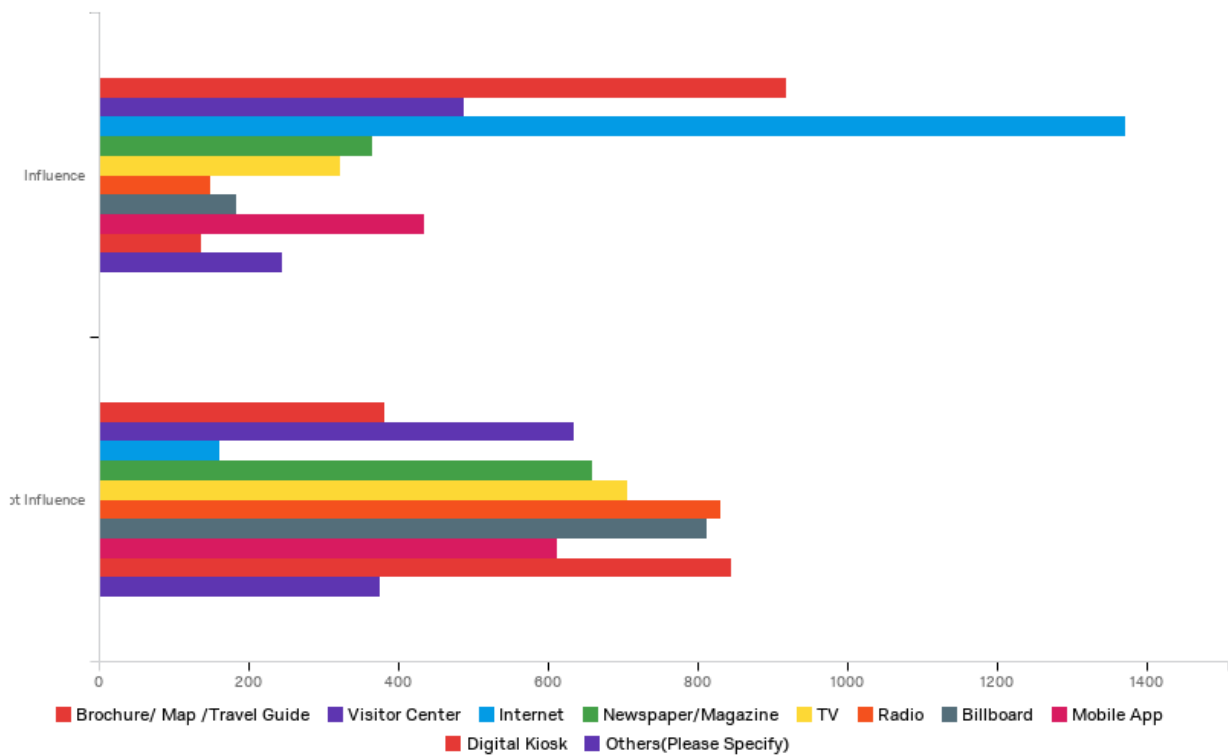
The majority of visitors travelled as tourists and had stopped at a tourist location for vacation, personal enjoyment and interest. In 2016, there was an uptick of leisure travelers, **86%** of tourists were visiting for leisure (up from **75%** 2 years ago) and an additional **6%** were combining a leisure activity with a business trip. Only **17%** of people were travelling on their own. The survey sampled men and women equally. Out of towners were the majority of visitors (**86%**). The largest demographic group of visitors fall into the Gen Y (18-35) category and the bulk of the survey respondents were in the 35-55 age range. Women are more likely than men to select brochures and share the content with their friends or companion/partner. We continue to observe that the age group of female brochure users is expanding to include younger women aged 18-24 reinforcing the insight that 'digital natives' also appreciate printed brochures for information.

Influence of Brochures Before a Trip is Holding Steady

In an age of increasing broadband and Wi-Fi coverage, smartphones and tablets it is unsurprising that the Internet continues to provide the primary source of information for tourists planning a trip, increasing in importance from 2 years ago (**79%** up from 53% focusing on major influence scores). Ranking second as a pre-trip influence and representing over half the visitors (**53%**) reported they also used printed brochures,

maps and travel guides to help plan a visit. Visitors to California and Canada were particularly likely to also use printed destination material. While the web and printed brochures dominate the planning experience, we are seeing a growth in the use of all media to influence the planning process - television (19%), newspapers (21%) and billboards (11%), and radio (9%). This suggests that trip planners appreciate living in a multi-media world and are not immune to all forms of media and destination marketing. Marketers have tough decisions to make regarding their media spend after budgeting for print and web.

Fig. 1. Most Useful Trip Planning Resources

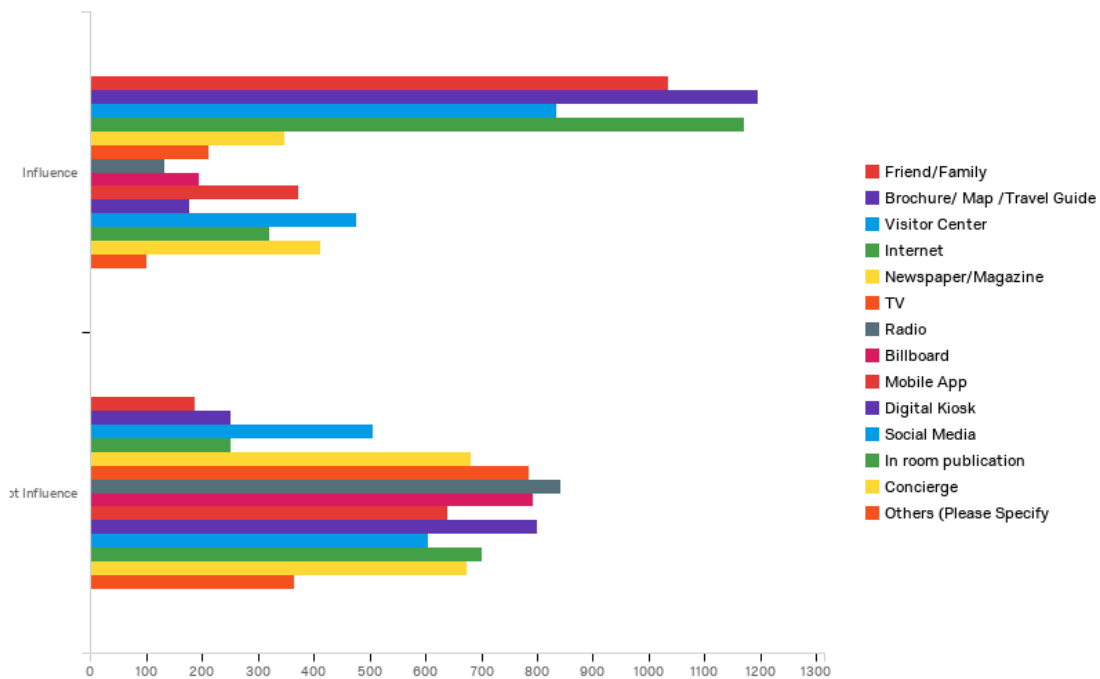


Brochures are the #1 In-Market Influencer During a Trip

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 (69%) has edged ahead of web sites (68%) when a tourist arrives at their destination. The web continues to grow in importance but brochure racks are more than holding their own. Social media (27%) and mobile apps (21%) are also gaining ground. In an age of DIY travel it is also significant to note that visitors appreciate human contact and recommendation from family and friends (60%), visitor centers (48%) and the hotel concierge (24%). These

results tally with the *January 2016 IAPBD Hospitality Study* that revealed the value of Hotel Concierge and Front Desk staff to assist visitors on location. Significantly, hotel staff highly value the use of printed brochures in hotel lobbies to assist them and their guests make good entertainment and attraction choices. In market is where we see traditional media (television, newspaper and radio lag far behind all other forms of marketing that influence visitors (8-12%).

Fig 2. Most Useful In-Market Resources



Top Ten Ways Brochures Positively Impact Visitors During a Trip

1. 2 out of 3 of visitors picked up a brochure during their trip (67%)
2. The travel plans of almost all of these visitors was influenced by a brochure in market at their destination (95%)
3. More than 4 out of 5 visitors planned to visit an attraction or business as a result of picking up a brochure (83%)
4. Nearly 4 out of 5 visitors would consider altering their plans because of a brochure (78%)
5. 2 out of 3 visitors planned to purchase tickets or merchandise for businesses they learned about from a brochure (65%)
6. 7 out of 10 visitors value information about current exhibits, events and attraction (68%)

- 7. 6 out of 10 visitors find brochures to be a tangible, easy to use hard copy of information (60%)
- 8. 6 out of 10 visitors believe brochures are trustworthy (59%)
- 9. More than half of visitors appreciate that brochures are convenient and always available (53%)
- 10. More than half of visitors value discounts and coupons in brochures (51%)

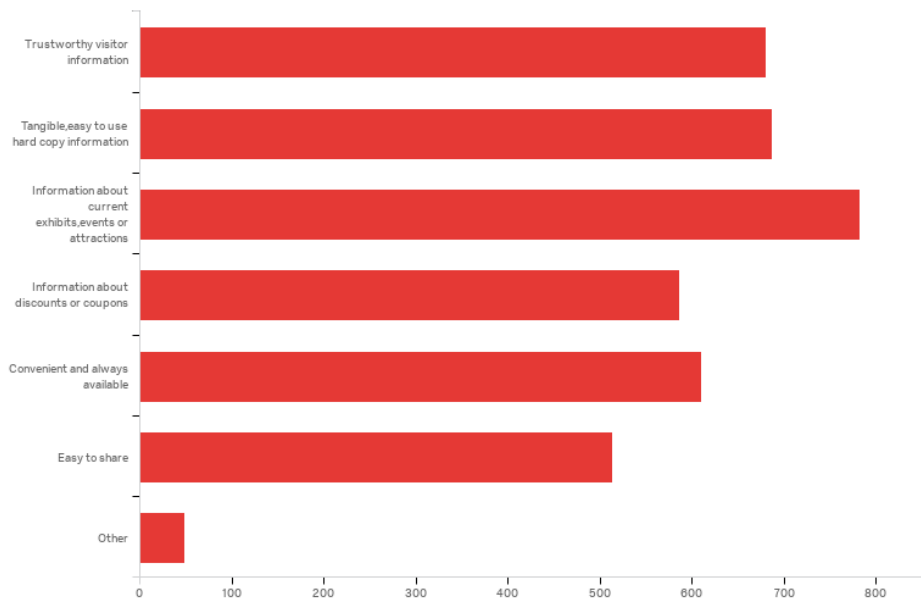
Sharing Information

More than 4 in 10 visitors value brochures because they are easy to share (44%) with friends and family on the trip. Printed brochures are more easily shared than electronic information on a device. There is something personal about sharing a mobile device with a friend to select places to visit and things to do – we can surmise through our own personal experiences that devices can be dropped, broken, reveal personal experiences from texts, etc. Travel brochures are designed with one purpose in mind – to share easy to read information about new places and things to do. Out of the visitors who picked up a brochure:

- Over 1 in 2 shared a brochure with 1-2 people (57%)
- Over 1 in 3 shared a brochure with 3-4 people (35%)
- Nearly 1 in 10 shared a brochure with 5+ people (8%)

Therefore, the distribution reach of a printed brochure can be as much as 8 times greater than a single reader and in many cases at least 2-4 times greater.

Fig 3. How Brochures Add Value



Conclusion: Use of Brochures – the Visitor’s Customer Journey

Unequivocally, printed brochures increase awareness of local services and attractions (95%) and affect visitors’ plans positively in favor of visiting more attractions that they might previously have been unaware of (83%). Local businesses should note that 4 in 5 (83%) visitors would consider changing their travel plans to visit an attraction or business they read about in a brochure and 2 out of 3 visitors (65%) plan to buy merchandise or tickets from vendors they have learned about from a brochure. Not only are brochures perceived to be convenient, up-to-date and informative but visitors trust (60%) the information contained in the brochure. It is clear that brochures clearly add value to visitors and merchants at their destination.

The longitudinal insights from Visitor International surveys over the past 10 years show that visitors have an increasing array of media and information choices to help them plan trips and influence their activities in market. We have seen the increasing use of the internet to access general and specific websites, largely fueled by the explosive growth in Smartphone use and improved high speed Wi-Fi in the USA. This has led to an increased use of Apps for Android and IOS devices as marketers have realized the easy to use, always available benefit of Apps on a screen in the visitors’ hand.

However, we have not seen the disappearance of traditional media as an influencer of visitor behavior. What is clear is that there are many marketing touch points that influence the visitor during their buyers’ journey and there is a complex interaction between thought and action for every visitor. What is not clear yet in this customer journey is how each element of the marketing media mix is affecting decision making in the moment of planning a trip and deciding on a course of action during the trip. What is clear is that in an increasingly digital world printed brochures have a very significant effect on visitors plans and actions, particularly in the moment, on location.



Bentley University | International Visitor Information Survey

Every 2 years Bentley University in the USA collaborates with the global tourism industry to survey the attitudes and behaviors of tourists in cities around the world. Please help us with our 2016 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	<input type="radio"/>	<input type="radio"/>
Visitor Center	<input type="radio"/>	<input type="radio"/>
Internet	<input type="radio"/>	<input type="radio"/>
Newspaper / Magazine	<input type="radio"/>	<input type="radio"/>
TV	<input type="radio"/>	<input type="radio"/>
Radio	<input type="radio"/>	<input type="radio"/>
Billboard	<input type="radio"/>	<input type="radio"/>
Mobile App	<input type="radio"/>	<input type="radio"/>
Digital Kiosk	<input type="radio"/>	<input type="radio"/>
Other, Please specify _____	<input type="radio"/>	<input type="radio"/>

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
Friend / Family	<input type="radio"/>	<input type="radio"/>
Brochure / Map / Travel Guide	<input type="radio"/>	<input type="radio"/>
Visitor Center	<input type="radio"/>	<input type="radio"/>
Internet	<input type="radio"/>	<input type="radio"/>
Newspaper / Magazine	<input type="radio"/>	<input type="radio"/>
TV	<input type="radio"/>	<input type="radio"/>
Radio	<input type="radio"/>	<input type="radio"/>
Billboard	<input type="radio"/>	<input type="radio"/>
Mobile App	<input type="radio"/>	<input type="radio"/>
Digital Kiosk	<input type="radio"/>	<input type="radio"/>
Social Media	<input type="radio"/>	<input type="radio"/>
In Room Publication	<input type="radio"/>	<input type="radio"/>
Concierge	<input type="radio"/>	<input type="radio"/>
Other, Please specify _____	<input type="radio"/>	<input type="radio"/>

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

- Yes No – Skip To Question 10

4) Did a brochure make you aware of a service or attraction?

- Yes No

5) Are you planning to visit a business or attraction that you saw in a brochure?

- Yes No

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

- Yes No

7) Do you plan to purchase tickets or merchandise for businesses you learned about from a brochure?

- Yes No

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

- 1 – 2 3 – 4 5
+

9) 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 discount or coupons
 Convenient and always available
 Easy to share
 Other _____

10) What is the primary purpose of your trip

- Leisure Business
Both

11) What gender do you identify with?

- Male Female

12) How old are you?

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

13) How would you describe yourself?

- Tourist or Visitor Local Resident

14) Which city are you in now?

Thank you for taking this survey.