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EXECUTIVE SUMMARY

The goal of this research was to conduct a survey of travelers that documents the effectiveness of brochure rack-distribution relative to other information channels. Through a cooperative effort, 1,259 travelers in 14 cities in three countries submitted survey information. Surveys were distributed at lodgings, attractions and visitor centers representative of tourism in the area. Over three-quarters of respondents were non-residents, on vacation or a leisure trip, and were spending more than one day away from home, with about 40 percent never having visited the area before.

Respondents were asked if they got a brochure from a brochure rack prior to leaving home, and over a third (34%) had done so. The most frequent respondent to pick up a brochure prior to leaving home was a first-time visitor (40%), on a multi-day (39%) trip, with a vacation or leisure purpose (37%), who was a non-resident (36%). When asked if they got a brochure from a rack since leaving home, over half (53%) had done so. About two-thirds (64%) of respondents got a brochure either before or during their trip. The most frequent respondent to acquire a brochure either before or during their trip was on a multi-day (98%) trip, with a vacation or leisure purpose (97%) who was a non-resident (72%). This means that almost all respondents on a multi-day vacation got a brochure from a brochure rack either before or after their trip to help them plan it.

The survey provided a list of tourist information sources and asked if they had seen or heard any of these since leaving home. Brochures from a brochure rack was the most frequently mentioned media (53%), followed by friend/relative referrals (49%), visitor centers (39%), printed maps (38%), websites (31%), and travel guides (29%). TV (21%), billboards (21%), staff at businesses (20%), newspaper (19%), travel agency (13%), email (11.2%), radio (10%) and other sources (6%) made up the balances. When asked which of these sources were actually used, brochures from brochure racks was the most often utilized (52%), followed by friend/relative referrals (42%), visitor centers (36%) and printed maps (32%). Respondents most frequently became aware of a service or attraction from brochures in racks (36.2%), friends/relatives (25%) and visitor centers (25%). Information in brochures from racks was also the most commonly mentioned information source that encouraged them to visit a new area or attraction (21%), change their travel plans (12%),

and to purchase something (8%). Respondents stated that the most important information sources in trip planning since leaving home were, in rank order from most to least important, brochures from a rack, friends/relatives, visitor centers, printed map, travel guide, internet website and employee at a business.

Another part of the survey queried respondents on whether or not getting a brochure from a brochure rack (either before or after their trip) influenced them in several ways. Over half (59%) actually visited an attraction or purchased something, over one-third (37%) used a discount coupon from a brochure, one-third (33%) learned about a company website or email address, over one-quarter (29%) actually visited an organization or company website, and over one-tenth actually emailed the organization or company either before or during the trip (12%). This data demonstrates that brochures are driving visitors to company websites and generating email inquiries.

A final survey section asked respondents about the use of wireless technology (such as WiFi) and a laptop computer outside of company offices to access the internet and gather travel information during their trip. Over one-third (29%) used wireless to access the internet outside their office to help plan their trip. Respondents who used wireless technology were more likely to be traveling for business purposes (46%), visited the area previously 3-4 times (34%) and were on a multi-day trip (31%). The majority (56%) of those who used wireless to gather trip information rated wireless technology as either very or extremely important in their trip planning. Those respondents traveling for business purposes (62%) rated wireless either "very" or "extremely important". 56% of vacation/leisure travelers rated wireless "very" or "extremely important". This information shows the growing use and importance of wireless technology for trip planning.

In summary, about one in three respondents gathered a brochure from brochure racks to help them plan their trip prior to leaving home; about half gathered a brochure after leaving home; and nearly two of three collected a brochure to help them plan their trip either before or during their travel. This data shows the high frequency of brochure gathering for trip planning before and during travel. Brochure collection was most frequently done by those on a multi-day trip, with a vacation or leisure purpose, who were non-residents. These tourists are looking for new services and attractions, and the exact target for many tourism

businesses. Brochures from a brochure rack were the most frequently used source of visitor information, with much greater use-levels than chamber of commerce visitor centers, printed maps, travel guides, billboards, websites, newspapers, a travel agency, email or radio. Brochures also outperformed all other media and information distribution channels in helping respondents become aware of a new service or attraction, decide to visit a new area or attraction, changing their travel plans and to purchase something. Respondents stated that the most important information sources in trip planning since leaving home were brochures from a rack, compared to all the other media, including travel guides and internet websites. Information search via websites connected by wireless networks and laptop computers was used by about a third of respondents and the vast majority rated wireless as very important in their trip planning. But again, brochures had a significant impact by providing website and email addresses for over a third of respondents. In other words, brochures are driving business to company websites via wireless and land-line networks and email.

There is strong evidence that brochures distributed in racks continue to have their basic appeals of simplicity, colorful presentation and placement relevancy. Results from this traveler survey conclusively demonstrated that brochures out competed all other media for distribution of during-trip information. They are used by a broad cross-section of travelers, even those who accessed the internet via WiFi. Brochures were more effective than other tourism information channels—not just for information search, but to change travel plans and result in new reservations and purchases.