

# UK VISITOR INFORMATION RESEARCH 1997 (Abstract)

(July 1997: 6 groups in key target areas for visitors to Wales; Manchester, Reading, West Midlands)

## Background and Objectives

The project follows on from a quantitative study undertaken during the Summer of 1996. The objectives of this qualitative research were to explore a number of issues in depth with UK holiday, short break and day visit takers. The specific issues were to:

- investigate why various sources and types of visitor information have differing levels of importance at the pre-visit and during visit stages;
- understand what influence the information gathered has on the various stages of decision-making;
- understand why some visitors gather no information at all and others use information at different stages to varying degrees, and
- explore the actual use of various types of information and the value attached to each, by using specific examples to prompt discussion.

## Pre-visit Information Gathering

Predominantly rational decision-making, not emotional

### Step 1 – Location (choosing a location)

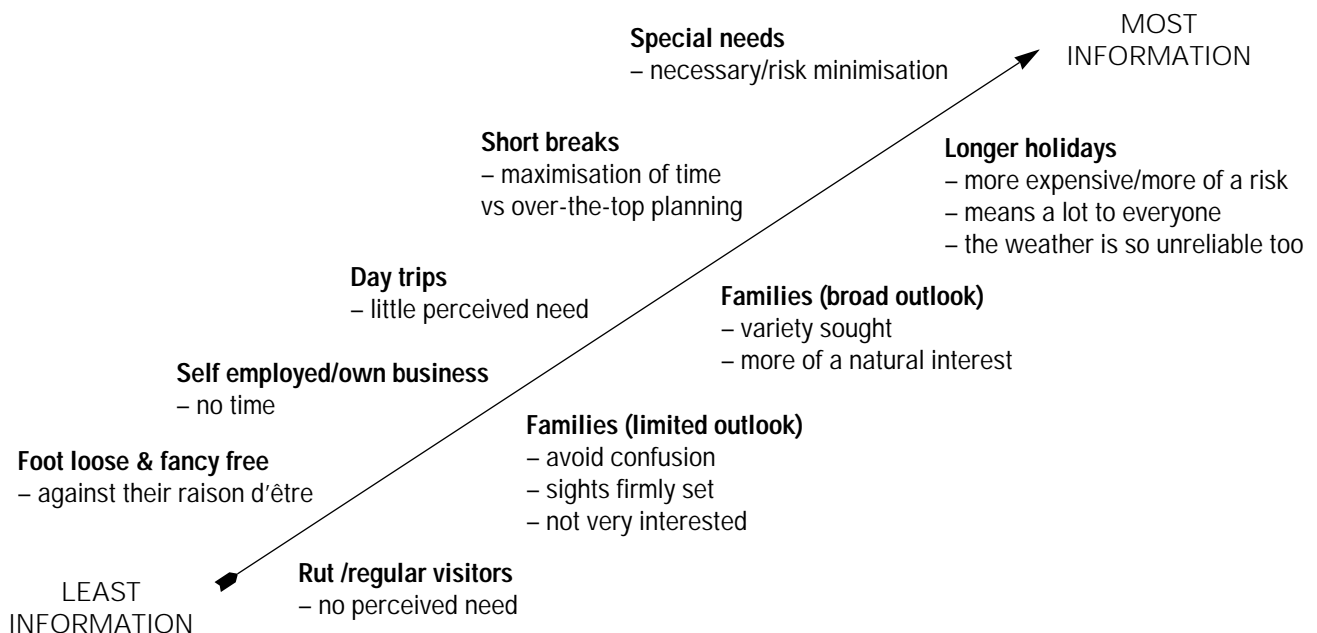
Experience  
Word of mouth  
Newspapers  
Mailings  
Ads/editorials  
(Re-active gathering evident)

### Step 2 – Accommodation (booking accommodation)

Accommodation  
TIC  
Travel agent  
Newspapers  
(Habitual gathering)  
(Specific places to stay requested, other info automatically included in this)

### Step 3 – Build-up time (time between booking and taking the holiday/trip)

Minimal gathering conducted.



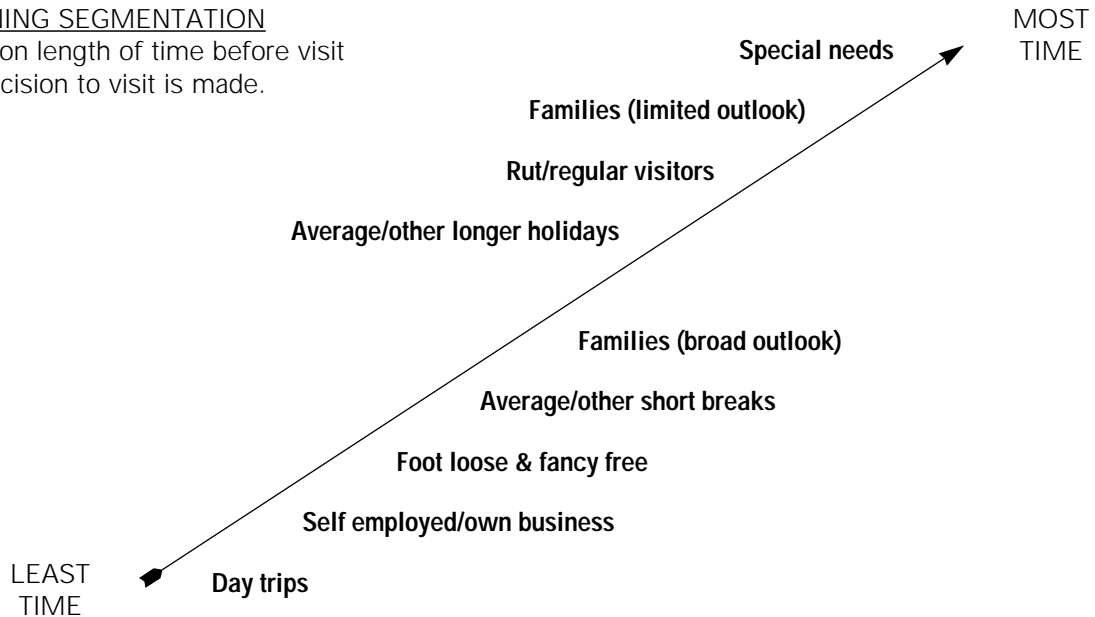
## Planning the visit:

For some, decisions can be made 6–12 months in advance.

For others the whole planning process can take place in a matter of days leading up to the visit.

### PLANNING SEGMENTATION

Based on length of time before visit that decision to visit is made.



### **Day trips**

Planned with very short notice generally. Largely due to uncertain weather conditions and “how you feel/what takes your fancy” on the day.

### **Self-employed, own business/Foot loose & fancy free**

Tend to plan their visits with only days to spare. The former group feel tied to their work, unable to plan in advance for fear of having to cancel; the latter preferring the excitement of a surprise destination.

### **Short breaks/Longer holidays**

Two segments split by type of visit rather than type of visitor; if a mistake is made in the choice process, the latter can clearly have greater consequences requiring more planning, further in advance.

### **Families (broad outlook)**

Slightly less adherence to school holidays, more often looking round to something new and different with variety for both parents and children.

### **Rut/regular visitors**

Prefer to go where they have always gone and do what they have always done; liking in some cases the same room or caravan as in previous years. Behaviour is very safe and predictable and holiday bookings are often made for the next year while still on holiday.

### **Families (limited outlook)/Special needs**

The former group tended to be those with tight budgets, strict adherence to school holidays and an overall requirement that the visit be as ‘easy’ as possible to arrange and partake in. Their chief concern was that their children should be kept amused. High incidence of holiday-campers in this segment. The latter group has particular medical/disability requirements or perhaps have pets that they wish to take.

Overall there was a generally low perception of any potential availability problems relating to visits in the UK. Most respondents felt their needs would be met in most circumstances, very different from planning a holiday abroad which needed more advanced planning.

The planning segmentation has, therefore, a variety of discriminators including:

- lifestage;
- employment;
- attitude/character;
- practical issues, and
- preparedness to take a risk.

**Step 1 – Choosing the location:**

Sources of information used to choose a location, in order of significance were:

- Previous experience – easy and safe
- Word of mouth (friends, colleagues, relatives) – very powerful influence
- Knowledge of what is easy to get to, distance – practical
- Newspapers/offers (Sun, Daltons Weekly, local paper) – highest incidence of use for short breaks
- Mailing list (holiday camp, coach companies, hotels etc) – repeat visits
- Advertising/editorial – often confirmatory, “it was something I always fancied”

A location is very often decided upon with little pro-active information gathering. This includes the word of mouth element which is typically received....

Reactively: “We had a great time in....”, rather than via pro-active gathering: “Where would you recommend?” or “What do you think of....?”.

Importantly, word of mouth was one of the few ways that gave rise to serious consideration of a previously unconsidered venue.

Looking for offers in newspapers was one of the few pro-active elements of step 1.

**Step 1 – Location decision:**

- High usage    ◦ Some usage

	Previous experience	Word of mouth	Easy to get to	Newsp'rs /offers	Mailings	Ads /editorial
Day trip	•	•	•	◦		◦
Self employed/own business	◦	•	◦			◦
Foot loose & fancy free	◦	◦	◦	◦		◦
Short breaks	◦	•	•	•	◦	◦
Families (broad outlook)	•	•	◦	•	◦	◦
Longer holidays	•	•	◦	◦	◦	◦
Rut/regular visitors	•	◦	•		•	
Families (limited outlook)	•	◦	•	◦	•	
Special needs	•	•	◦	◦	•	◦

**Step 2 – Booking the holiday:**

Typical approach is first to request information on specific type of accommodation in location chosen. General information on area/region and places to visit/things to do are often automatically sent with information on accommodation, the point being that they are often received but not actively requested, though very welcome as part of the generally-favoured ‘all-in-one’ brochure format.

Events, travel and transport and information on local services (other than for special needs) were not regarded as high priority at this stage, except where a specific (sport related, festival etc) ‘event’ break is sought. these would often be sourced via the newspaper or, for some, the TIC in that region.

## **Step 2 – Sources:**

(Choice of source is habitual mainly.)

### **Accommodation establishment direct**

- previous experience/rut visiting
  - mailings/families (limited outlook)
  - word of mouth
- Little extra information required/received.

### **TIC at location of interest (then accommodation)**

- families (broad outlook)
  - average other longer holidays/short breaks
  - special needs
- Lots of extra information received, not always requested.  
Seen as independent, 'at your service', high standard.  
Referred to as 'tourist board', 'tourist people' etc.

### **Travel agent (then accommodation)**

- city breaks
  - coach tours/trips
  - holiday parks/camping
- Not focussed on UK, but fine/adequate for needs, no problems.  
Perceived by many as tour operator representatives. Not area/region focussed.

### **Newspaper/offer**

- direct contact with number supplied
- telephone lines not considered a great expense

### **Electronic (CD-Rom)**

- very early days for most
- very exciting area of opportunity, however
- virtual reality viewing (over-the-top for some)

### **Bookshops**

- some specific guides mentioned
  - Children-friendly (Egon Ronay).
  - Shell/AA 'leisure' books.
  - Camping guides.
- BUT GENERALLY "you don't need to pay for information, you can get everything you need for the UK for free".
- No real differences in quality perceived (maybe more detail, hotels more expensive though)
- TIC seen as 'independent'/on your side

### **Libraries**

- virtually no mention
- considered by the few for general information, maps, walks etc

TICs are seen very much as 'for the people', concentrating on ensuring visitors have everything they need. Visitors do not perceive a need to pay for information, feeling they can acquire good quality, independent information, fulfilling their needs, for free.

### **Pre-visit information gathering mood:**

Associations made with the idea of pre-visit information gathering and planning were less than exciting.

### **Mood**

Lack of any real animated response to the idea of information gathering.  
A chore, bore, necessity (for some, unnecessary (for others), time-consuming, unexciting, and limiting.

“Well we all know the UK, we’ve all been a hundred times.”  
“I haven’t got time to sift through 100s of pages.”  
“It’s supposed to be a holiday, a break, a change, not predetermined.”  
“You don’t know what you’re going to be doing every minute of the day.”

Seemingly any visitor information provider has a significant facilitating role to play in the encouragement of visitors in the UK to gather information when planning their holiday.

### **Role in decision-making:**

There was little evidence that information is viewed, at the pre-visit stage, in any significant competitive context. A location (whether a broad region, such as the South Coast of Wales, or specific site) is often very strongly favoured in advance of any detailed planning and the main decision-making revolves around which specific accommodation establishment to choose. Further, this decision-making is conducted, in the main, on the basis of very practical issues such as size, price and facilities rather than ‘more inspiring’ and emotional issues such as adventure, romance and the search for something unusual or different.

### **Step 3 – Build up time:**

Everything goes extremely quiet at this stage; the visit is booked and the brochure is put away until its time to go. There are a small number of exceptions to this rule:

- men often seem to go and buy, with some enthusiasm, an Ordnance Survey map of the area to be visited;
- a very small number were in the habit of visiting their local TIC or library for any ‘extra’ information they might have, notably on walks and places of interest (on mentioning of this, several others in the group expressed surprise and interest that local TICs would have information on other parts of the country); and
- an even smaller number search for old information in their attics or cupboards from previous visits.

But on the whole little time and effort is spent on information-gathering during the build up time.

The day before setting off, or even on the day, several turn to teletext for news of weather and travel conditions, or the AA for the quickest route.

## **During Visit Information Gathering**

### **Phase 1 – Arrival**

Places to visit

General information

Events

(Peak of enthusiasm/effort)

(Revenue expansion opportunity)

### **Phase 2 – Duration**

Verbal recommendation and viewing have an enormous influence throughout in places to visit/eat.

Effort needed to influence this process.

(Pubs, shops, signs, staff etc)

### **Phase 3 – Departure**

Sorting of information collected in to ‘take home’ or ‘throw away’.

(Encourage positive word of mouth and return visits)

(Take home the visitor pack and/or receive ‘follow up’)

### **General:**

Very similar relative attitudes and behaviour were evident for the nine information-gathering (planning) segments, as for pre-visit. The amount of previous knowledge of a location also has a significant effect on during visit information gathering.

A summary of how each of the segments stand on during visit information gathering, can be given as follows:

### **Day trips**

Road signs important.  
General information on the attraction/location (TIC).  
Map of the attraction.

### **Foot loose & fancy free**

Interested in talking to the 'locals', " See what happens".  
Good opportunity for the tourist industry, anything goes.

### **Self-employed/own business**

Likely to use TIC and accommodation establishment.  
Quite open to ideas, need to maximise time (especially with children).

### **Short breaks**

Information must be easily available.  
Time not spent chasing information, no waste of time.  
TIC, accommodation.

### **Families (broad outlook)/Longer holidays**

Looking for interest, adventure, unusual.  
Enthusiastic generally.  
Various sources used.

### **Rut regular visitors**

No information gathered.  
Simply relive the experience.  
Familiarity is very important.

### **Families (limited outlook)**

Rarely venture out from camp/site.  
Maybe if weather is poor.  
Information provided in room/reception ample.  
Budget limited.

### **Special needs**

Quite a lot of planning already done.  
A lot of back checking takes place.  
Word of mouth valued.  
Caution applies.

### **Phase 1 – Arrival:**

KEY PHASE OF INFORMATION GATHERING. Generally a little more effort is afforded and enthusiasm for information is at its peak. It is at this point that planning for the holiday really starts to happen.

### **Types/sources of information:**

- Places to visit/things to do – accommodation' pack', word of mouth, TIC
- General information – accommodation, word of mouth, TIC
- Events – word of mouth, TIC
- Local services – special needs group check information
- Travel and transport – men get more maps, road signs play an important role
- Places to eat (not purely phase 1) – mainly by viewing, also recommendation
- Specific places to stay (not purely phase 1) – viewing for now/future, TIC book ahead if touring

(Mostly verbal, leaflets, maps, also visitors books scoured.)

Leaflets are preferred at this stage to brochures. Visitors do not want to spend large amounts of time

scanning the information and still want the process to be as easy as possible. Word of mouth is a powerful influence, whether it be via staff, locals or other visitors.

Packs of information were very popular, welcome packs in accommodation establishments for example, from the point of view of ease and value attached.

Phase 1, arrival, is a key time for the tourist industry in terms of information provision to maximise opportunities for revenue expansion. Enthusiasm, even though still coloured with large doses of British caution, peaks at this stage. Children are keen to know the itinerary in great detail to know what is planned for them. Back-up events are considered too for any rainy days that may occur.

Most segments are actively seeking information, although rut/regular visitors and families with a limited outlook remain difficult targets.

Visitors still do not perceive the need to purchase information. All their needs can be fulfilled at no charge.

## **Phase 2 – Duration**

As the holiday unfolds it is clear that most visitors are still open to influence, even though in their minds they have switched off again from information gathering mode.

Road signs play a significant part in bringing places of interest to light. Local pubs, cafes, shops and restaurants too supply leaflets and very importantly accompanying these will be very powerful verbal recommendations, both positive and negative. Equally powerful word of mouth sources were the locals and other visitors.

Local newspapers too are favoured by some.

As venues are visited guidebooks and programmes will often be purchased, but these are generally taken home to read after the break or holiday. A significant amount of free information was also picked up for taking home, especially by women, particularly booklets and magazines.

It is clear then that opportunities exist for the duration of the visit, to encourage information collection and hence increase **participation levels**, although collection is at a more passive level after the initial burst upon arrival. Delivery, therefore, needs to be more pro-active. Even rut/regular visitors and other difficult targets will be more receptive during this phase, as they have settled in and conducted some of their familiar rituals – hence they begin to feel a little more confident and may even be tempted into trying something new.

## **Phase 3 – Departure**

All the information collected over the visit is sorted into that which is considered 'durable' and that which is to be discarded, largely 'flimsy' items of information such as leaflets and papers, especially items of information that did not lead to successful visits.

### **Examples of durable information taken home:**

- booklets
- guidebooks/programmes (souvenirs)
- any information that has been paid for
- particularly-enjoyed venues – leaflets
- magazines and brochures
- maps

## Stimulus Material Assessment

### Pre-visit

A number of items of literature were passed round the groups in order to stimulate discussion on the ideal information format. These were:

- The Hotel Portmeirion – 1/3rd A4 leaflet
- Walks for Everyone – 1/3rd A4 leaflet
- Oakwood Coaster Country – 1/3rd A4 leaflet
- Pocket Cardiff Map – 1/3rd A4 leaflet
- Wales Bed & Breakfast Touring Map – A5 leaflet
- Great Little Places – A5 booklet
- 24 Great Attractions in South East Wales – A5 booklet
- Valleys Fun Planner – A5 booklet
- Staying in Wales – A4 brochure
- A View of Wales – A4 magazine
- Events Wales – A4 flier
- Mid Wales Lakes and Mountains – A4 brochure
- Sir Gaerfyrddin, Carmarthenshire – A4 brochure

Brochures are the generally-preferred format for receiving information at the pre-visit stage. The front cover is a powerful indicator signalling to potential visitors, at a basic level, whether or not the venue is likely to be appropriate.

“The one with Hugh Grant on (*Mid Wales Lakes and Mountains*) tells me its rustic and rural surroundings, so I’ll know we’ll like it already.”

Front covers could very quickly give indications of such attributes such as culture, tranquillity, family-orientation etc. The scenes portrayed inside would then add shape to these initial impressions.

Quite significant associations with quality establishments were made according to the thickness of the paper used in the brochure. *Great Little Places*, for example, was perceived to contain high quality establishments probably at the most expensive end of the spectrum, due to the quality of the booklet itself.

opinions on ‘ease of use’ centred on the sectioning format used within the brochure. Colour-coding was strongly favoured overall, along with a comprehensive contents page.

The most useful inclusion with a brochure was considered to be an events listing, for including (or avoiding) events.

Probably the most powerful impression-forming information format was, however, verbal contact and responses, especially from individuals representing the potential visit location, ie TICs, accommodation establishments etc. The level of perceived ‘Welcome’ given and interest shown by these individuals, not only affects the decision on an individual establishment but it is taken as a general indication of what to expect in that region.

The View of Wale Magazine was popular with respondents, especially females. They felt it was something they would be likely to pick up and bring home to read or it might be sent on a regular basis once one is on a database of visitors to Wales.

Maps were extremely popular, of almost any description at any stage in the process, especially with male respondents.

## **During visit**

Once on holiday, visit respondents were eager that they did not want to spend time poring over detailed irrelevant information.

They felt leaflets were the most appropriate information format at this stage so that they can be entirely selective, choosing only information of relevance to the particular visitor. The ideal leaflet would include:

- photographs;
- descriptions;
- opening times;
- price;
- directions, and
- facilities available

Verbal information was again quoted as one of the most powerful sources whilst on a holiday or visit. This could be from staff, locals or other visitors.

Road signs too and sightings within the local area can have an impact on visiting decisions.

Two other items of literature received enthusiastically by respondents were the two booklets: *24 Attractions in South East Wales* and *The Valleys Fun Planner*. These were considered ideal for families, showing instantly the choice and variety of venues in the area.

It was pointed out strongly that a fold-up format was totally unsuitable, at this stage, and generally unpopular at any stage (excluding maps), due to the desire to carry items of literature with you each day and trying to deal with a fold-out leaflet in the car was not considered to be user-friendly. A booklet format was preferred for collective presentation of attractions.

## **Opportunities for the Future**

### **Electronic information:**

Males up to 30 showed a particular interest in this information format. Females and older males revealing reservations about their ability to deal with electronic information sources.

It was considered highly likely by all, however, that in ten years time this will be one of the main sources of information, being well-suited to tourist information scanned at leisure in the comfort of your own home.

### **Loyalty schemes and regular mailings:**

This was an area where females showed a particular enthusiasm and some males were rather cynical:

Female bias:

"Key camps send you a pack with all the maps and things, an area booklet and another thing they did was to put vouchers in which is really good on family holidays because it really does influence you. Quite often we've thought oh we've got a voucher, we'd rather go there and get a child free."

"Six years ago we went to Spain. We bought a card, I think it was about £5 before we went and it gave you discounts in different places. It was valid for 12 months. You could go into a shop and it was like 5% or 10% discount. It was really handy, you could get one ticket free, or get a free glass of wine. It was a really good idea."

"Haven, or someone like that, gave you a big folder when you arrived. A welcome pack."

"I was sent a letter, after I stayed in the cottage, offering me all sorts of incentives if you come back, answer the questionnaire, recommend to a friend, discounts, which I thought was good."

Male bias:

"10% off would not determine whether I go to some place, it is whether I want to do whatever it is they have on offer, simple as that."

Nothing in life is free, I think you have to remember that. Anybody who believes they are getting something for nothing is a bit sad."

But not all:

"Sometimes they give you a passport to leisure type thing, for want of a better word, and like you get 50p off if you visit this place and 20p for that, its like a voucher. The B&B or hotel will give it to you. It tends to work."

Females are particularly tuned in to loyalty schemes and associated mailings via various retail outlets and particularly supermarkets, They are viewed as a thankyou for custom and received positively.

### **Dealing with creatures of habit and caution:**

it is undoubtably clear from this research that holidaymaking and visiting within the UK does not inspire individuals to arm themselves with all the available information or in fact little information atall. This is due to perceptions of UK familiarity, lack of time and it being a dull and uninteresting task. Further the overriding nature of the UK visitor seems to be habit, reserve, caution and lack of adventurous spirit.

"We take this country for granted. When you go abroad for a few weeks, let's do everything but when you're at home, if it's only two hours drive, you think, oh, I can come back and do this another time."

"We always go to Norfolk where my parents used to live. We know it all so well and we like the Saturday markets."

"Children aren't very welcome in this country."

"You know you're OK if there's a Harvester."

"I know it's going to have to be a MacDonalds. Well actually we ate in Tesco's mostly last time."

### **Targeting of information:**

One of the ways of beginning to inspire these individuals with information would be to simplify and enhance the process for them. Targeting of the available information is a good starting point. The individual perceives that much of the filtering work has already ben done and that the majority of the information enclosed will be of relevance and interest to his/her situation.

The most useful format would be separate packs of information (ideally brochures at the pre-visit stage) for identifiable groups of visitors:

- new visitors
- regular visitors
- special breaks
- short breaks
- families
- free and easy couples

Most respondents reacted positively to this idea, recognising that much of the information contained within the packs would overlap but that perhaps the small amount of tailoring necessary might just be the trigger to actually pick up the information and take notice.

## Informing the UK Visitor

### Barriers to fully informing the UK visitor:

- time pressures;
- familiarity with the UK, and
- general lack of interest in the perceived arduous process of collecting, sorting and scanning information.

### Making the process appear easier would be the most effective approach, including:

- appropriate targeting of information to visitor types;
- re-presentation of the area to regular visitors in order to re-inspire them;
- educating the public on the various sources of information available to them in the UK, and
- taking note of issues that have a clear added-value for visitors e.g.
  - maps
  - booklets
  - verbal sources of information
  - loyalty schemes, offers, discounts
  - electronic information

A generic campaign to increase public awareness and understanding of TICs in the UK would be beneficial.

The results of generating enthusiasm and interest among UK visitors, in the collection and assimilation of information both pre-visit and during visit will be potentially greater participation levels, satisfaction levels, recommendations and return visits.

The challenges are to break down the barriers and change perceptions regarding the information process.

UK familiarity – how well do you really know it?

Represent the area, image building, capture (create) imaginations.

Arduous task – let us (tourist information) take the pain out of planning.

Targeting of information, education on sources available.

Too busy

Electronic information

Mailings

Incentives, discounts

## NOTES

1. Whilst mentioning under Phase 2 – Duration (of visit) that delivery of information needs to be more proactive, the research appears to have missed examples of where this is already taking place and missed therefore the opportunity to ‘bounce’ these examples off the focus groups.
2. It would be useful to know whether the word quality was thought of in terms of accessibility/presentation as well as to material, eg ‘This was a great leaflet/brochure/newspaper etc. I only wish that I’d discovered it earlier. It would certainly have made a difference to my trip.’ This introduces the concept of merchandising as opposed to simple distribution. It ties in also with note 3 to the *Visitor Information Survey 1996* on whether sources are sufficient to meet demand and/or accessible enough to stimulate consumption.
3. In the Discussion Brief under heading 4, ‘Material Assessment and the Future’, there is no reference to tourist information newspapers despite this item having been cited by visitors themselves in response to Question 13A of the *Visitor Information Survey 1996*. It is therefore surprising that tourist information newspapers were not then listed in the *UK Visitor Information Research 1997* discussion guide provided to the 6 focus groups. In fact, it can be said that this represents a marked failing of the later research and that a golden opportunity has been missed to answer many questions posed by the industry in general about the effectiveness of tourist information newspapers, and in particular by the Wales Tourist Board who commissioned the research.

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