THE VALUE OF PRINT
Decline
Maladie
Death
Décès
MYTHS & TRUTHS ABOUT
PRINT
CHRIS ADAMS
Head of Research & Insights
GM – South Pacific

Tel: +1 303 842 3394 (US)
Tel: +64 9 974 2452 (NZ)
Chris.Adams@MilesPartnership.com
www.MilesPartnership.com
THE ROLE & RELEVANCE OF PRINT
$100 million in Visitor Guide Advertising Sales
100,000+ Tourism Businesses

Source: Estimated & extrapolated from DMO Advertising Sales for 30+ Miles Clients 2014-2017
Truth or Myth?

Print is Dying

Usage of print publications by US travelers is in terminal & rapid decline
Truths or Myths?

Print is Dying

Print is mainly used by Older US Travelers

Younger US travelers use little or no print in trip planning
Truths or Myths?

Print is Dying

Print is mainly used by Older US Travelers

Print Advertising is Not Important

*Print advertising can be easily replaced with cheaper & more effective digital options*
Print is Dying
The State of the American Traveler

US Travelers
Print Usage Trends
Print Resources vs. Digital Resources: 2008 - 2016

Source: State of the American Traveler by Destination Analysts 2008 - 2016
Print usage reached a record level of 54% of US travelers in October 2016 (highest level since start of research in 2006).
Print Resources vs. Digital Resources: 2008 - 2016

Source: State of the American Traveler by Destination Analysts 2008 - 2016
Print informs the Hyper informed traveler

2014-2016: Shifts in Media Usage

- **49%** to **54%** Use Print Publications: Visitor Guides, Brochures, Magazines
- **40%** to **58%** Use Social Media in Trip Planning
- **41%** to **60%** Seek Out Reviews, Ratings and User-Generated Content for Ideas and to Validate Their Selection
- **60%** of Travel Decision Makers Are Female
- **36%** to **28%** Use Tablets to Access Travel Information*
- **19%** to **21%** Use Official Visitor Guides: City, Regional or State Vacation Publications
- **36%** to **31%** Use Official Destination Websites
- **41%** to **63%** Use Smartphones to Access Travel Information*

*Readers use their smartphone both before and during travel

**DMO Print & Website Usage Trends**

- **DMO Visitor Guide Use by US Travelers:**
  - 12-22%
  - Use Official Visitor Guides: City, Regional or State Vacation Publications
  - From a CVB or other DMO

- **Use Official Destination Websites:**
  - 31-43%
  - From a CVB or other DMO

*Source: State of the American Traveler by Destination Analysts 2006 - 2016*
Print is Used by Older Americans
Audience
Audience

71% Male

37 Years Old

Married

Affluent, Well Educated

Urban – Major Metro Centers

Source: Longwoods Travel USA Research 2016
Print Advertising is Not Important
How Many

??

travel website visits before booking

Source: Path to Purchase – Study of US, Canadian & UK Travelers, Expedia Media Services 2016
Before booking: >121 travel websites

Website usage of the Hyper informed traveler

Data Source: comScore UK, US and CA Desktop Panel, Custom Path to Booking Violation Analysis, Weekly Visits per User, Dec’15 – Feb’16. Average Travel Site Visits per Week (Number of travel sites visited per week by the average segment member, Oct’15-Feb’16 aggregate)

Source: Path to Purchase – Study of US, Canadian & UK Travelers, Expedia Media Services 2016
Print offers CUT THROUGH to the Hyper informed traveler

<10

Issues of Print Publications Read per Month

Source: Magazine Publishers Association Magazine Media FactBook 2016/17
Print offers TRUST to the Hyper informed traveler.

82% of US Consumers Rate Print Advertising as the most TRUSTED Ad Type.

Source: Marketing Sherpa 2016 Study
Print Influences

Travel Booking Decisions

Source: CVB Visitor Guide Study sponsored by DMA West & undertaken by Destination Analysts 2014
Print Influences

Travel Booking Decisions

Source: 10 custom Official Visitor Guide Readership Studies conducted 2008 - 2017
Print Influences

Travel Decisions

>67% of DMO Visitor Guide readers visited the Destination

>88% of these visitors indicated the Guide influenced their decision

Source: CVB Visitor Guide Study sponsored by DMA West & undertaken by Destination Analysts 2014
Print Influences

Travel Decisions

79% decide on an ACTIVITY OR ATTRACTION

51% decide on a DINING or FOOD & BEVERAGE choice

21% decide on a PLACE TO STAY

Source: CVB Visitor Guide Study sponsored by DMA West & undertaken by Destination Analysts 2014
Print Usage Remains Strong
Usage of print publications by US travelers is at near record levels

Print is Used by All Ages of US Travelers
Younger US travelers are even heavier print (& digital) users

Print Advertising is Still Relevant
Print advertising can still be important as part of a multi media strategy
Aspiration or Action?
What determines where & how print is used?

Print & Digital?
How do travelers integrate & cross reference?

Measurability
Measuring print in a Digital Centric landscape
IMPORTANCE OF Integrated Research & Industry Coop
ROLE & RELEVANCE OF DMO DIGITAL VS. PRINT RESOURCES
>500,000 Av. Unique Website Visitors Outside of Market
Source: 40+ North American DMOs. Miles DMO website benchmarking analytics program 2011 – 2017

<50,000 Av. Readers of Visitor Guide Outside of Market
Source: DMA West Foundation & Destination Analysts 11 CVB Visitor Guide Readership Study 2014
MONETIZATION OF WEBSITE VS. PRINT

<$100,000 Website Advertising Sales
Source: Average from estimate of DMO Advertising Sales for 30+ Miles Clients 2014-2017

>$200,000 Visitor Guide Advertising Sales
Source: Average from estimate of DMO Advertising Sales for 30+ Miles Clients 2014-2017
THE TRUTH ABOUT PRINT
New White Paper: VALUE OF PRINT

www.MilesPartnership.com
New White Paper: GLOBAL SMART

Global smart
Best Practices for Your International Visitor Marketing Programs

International Market Selection

There are a wide range of exciting international visitor markets offering opportunity. Work through these seven steps to decide the ones that you should focus on. Which markets offer you the best combination of:

- Size, Growth & Prospects - Which International Visitor Markets Offer the Most Potential?
- Air Routes, Capacity & Competition Including Easy U.S. Connections to Your Destination
- Which International Visitor Markets Best Suit You, Your Destination, Lodging, Experiences?
- Readiness of Your Organization and/or Partners to Market To and Service the Market
- Leverage Brand USA, Dept. of Commerce and Trade Market Partners. Which Markets offer Support?
- Relative Cost of Consumer and Trade Promotion in the Market
- International Marketing Partnerships – Opportunity to Work with Brand USA, States, CVBs & Other Partners

#1 Canada
#2 Mexico
#3 United Kingdom

Sponsored by Miles. Version 3.0 2011

www.MilesPartnership.com
The End of Tourism?

From Copenhagen to Colorado, Amsterdam to New Zealand, destinations are confronting the impacts of tourism growth. Is it the end of tourism as we know it?

Copenhagen’s new destination strategy declares “The End of Tourism As We Know it.” Colorado’s iconic Hanging Lake goes viral on social media — creating a surge in visitor numbers, parking chaos, congestion and threatening water quality. Bloomberg News describes New Zealand tourism with a headline; “Too Many People Are Going to New Zealand. And That’s a Problem,” noting the country’s visitor boom has “put infrastructure [and the] environment under pressure.” The Head of Marketing for Amsterdam CVB, Frans van der Avert, notes, “We don’t spend even €1 in marketing Amsterdam any more... we don’t want to have more people. A lot of smaller historic cities in Europe are getting destroyed by visitors.”
Thank you