



# Hospitality Visitor Information Survey October 2015 to January 2016

Summary Report Key Findings  
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February 2016

## Methodology

Bentley University, Center for Marketing Technology, created a survey in collaboration with the IAPBD to understand the usage and effectiveness of hospitality visitor information during October 2015 and January 2016. The new findings, examined 1,560 responses of hospitality professionals at locations in the United States, Canada, France, Germany, Ireland and Greece.

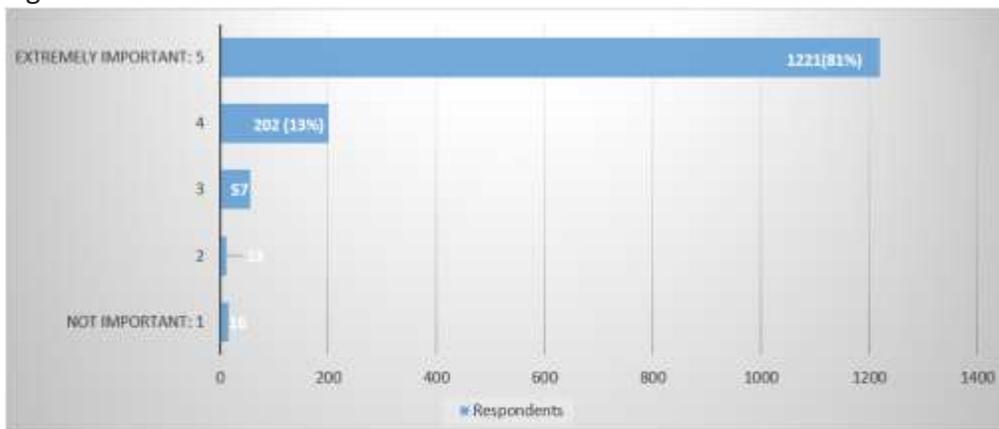
## Important Respondent Characteristics

The value of this data comes from the survey answers provided by the front office staff within the hospitality industry. These are the opinions of the professionals at the check-in and concierge desk that have the greatest potential to impact guest satisfaction with their accommodation.

## Print Media Is The Preferred Hospitality Visitor Information Resource

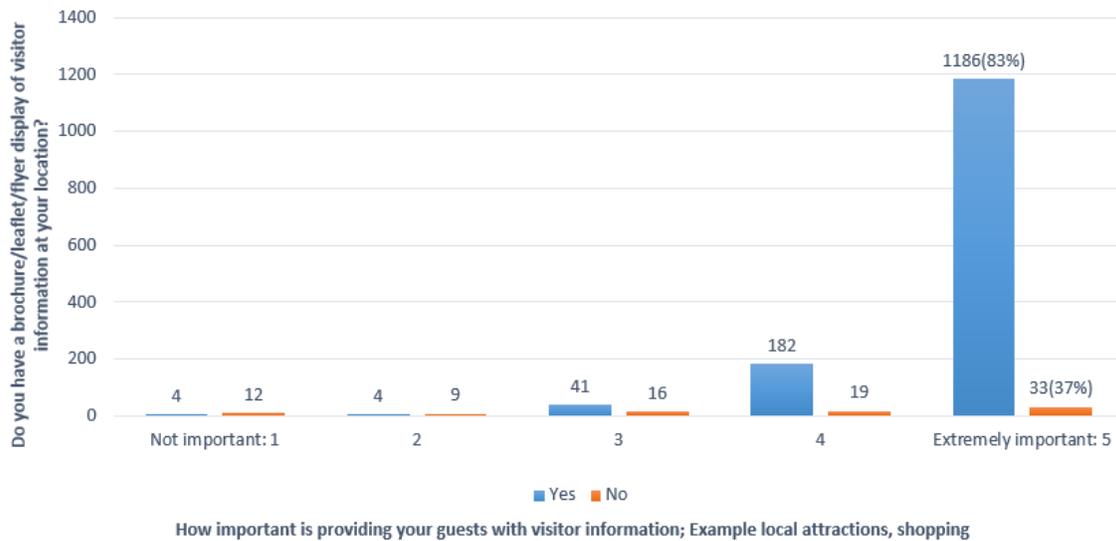
The survey shows hospitality professionals overwhelmingly favor the use of printed media to assist guests in their properties. 94% of hotels surveyed provided visitor information for their guest by way of a brochure display and an overwhelming support for visitor information services to be provided to their guests (94%). See Figure 1

Figure 1



83% (1186 out of 1417) of respondents who have visitor information available for their guests by way of a brochure display consider providing tourism information extremely important. Only 89 properties surveyed did not have a brochure display and there is a correlation between the perceived value of printed material in a display differing from those properties that rely on electronic kiosks, resulting in 37% (33 out of 89) of these properties recording a lower value for printed materials. See Figure 2

Figure 2



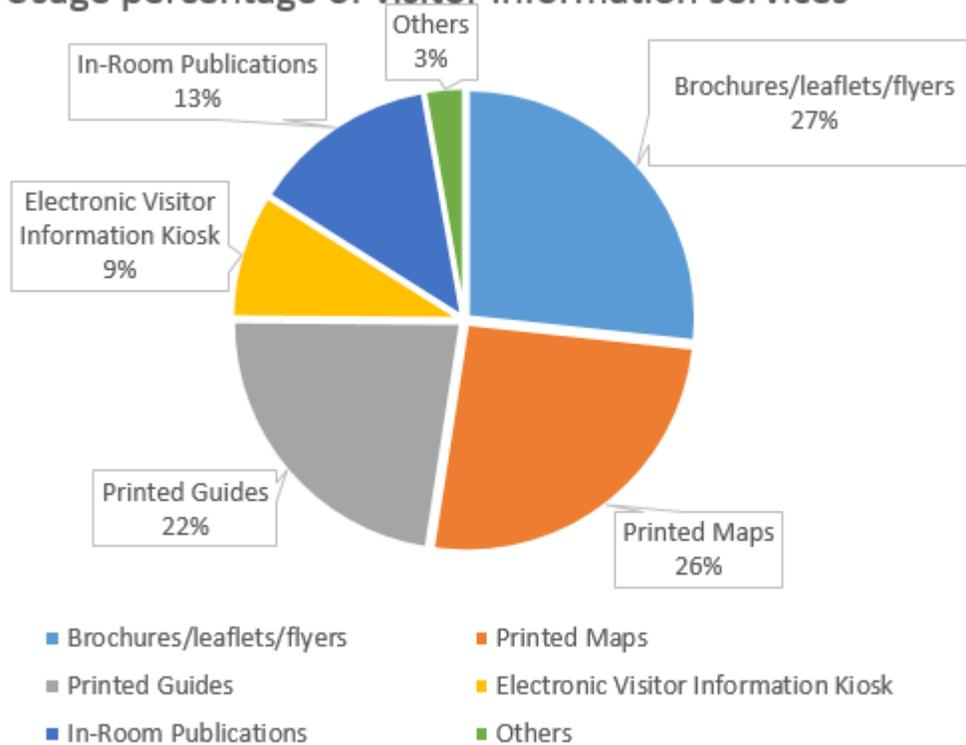
87% of hospitality professionals observe guests using brochures if their property has a brochure display in the lobby. 53% of hospitality professionals observe guests using brochures if their property does not have a brochure display in the lobby. Of these 53% of hospitality professionals 98% see value in having printed visitor information for the guests and 56% think it is extremely important to provide visitor information to guests. This data points to the value of a display to centralize guest information and provide a more convenient and easier source for guests to find what they need to enjoy the attractions of a new destination. It also demonstrates how often visitors will use their own printed sources even when the hotel has not provided printed material for their convenience.

Print media is far more highly valued by guests than electronic and kiosk information. Printed brochures, maps and guides placed in the lobby are much more likely to be used by guests during their stay. If the favorability of in room printed materials are also considered then printed materials outperform hotel electronic kiosks and other information by a margin of 88% to 12%. This is also true of hospitality professionals that have expressed the view that printed materials are not of value to their guests.

See Figure 3

Figure 3

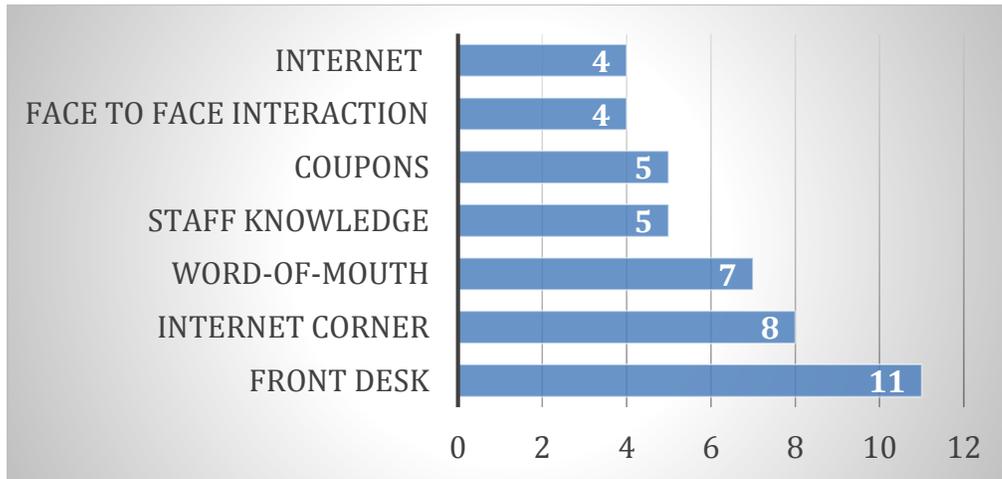
### Usage percentage of visitor information services



Printed brochures and maps are almost equally the most popular choice for guests and concierge staff. Maps are easy to use, easy to share and easy to trace a route along (26%). Brochures of attractions and events are the slight favorite (27%) and place-based guides are third (22%).

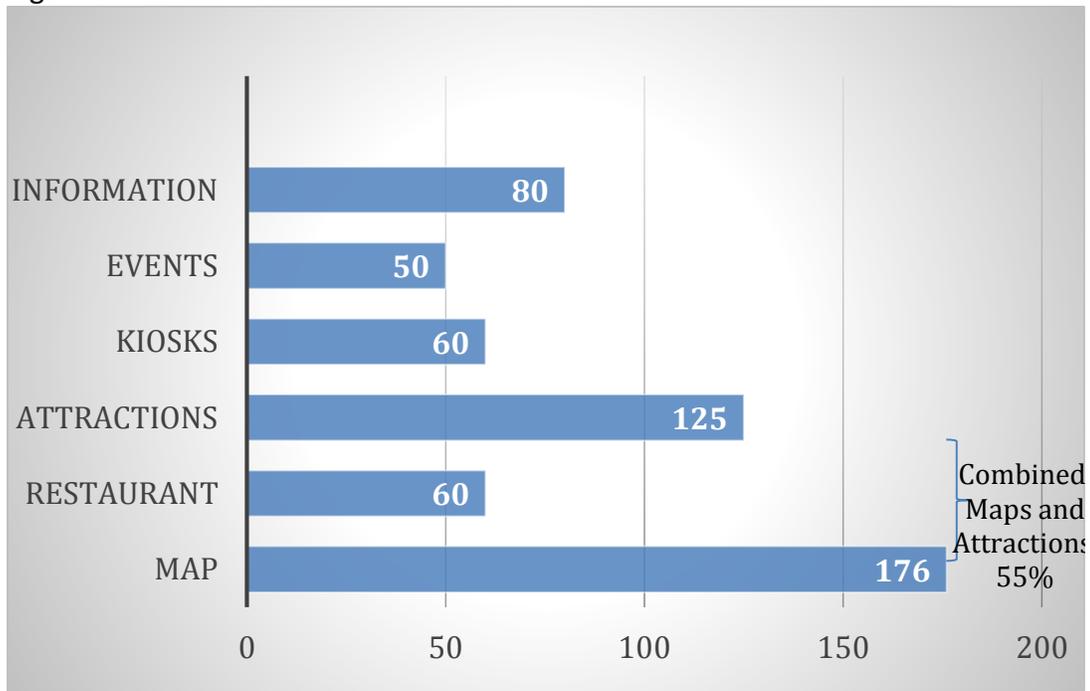
Rather unsurprisingly other visitor information services currently used at surveyed properties are led by personal interaction and knowledge of front desk staff. If this data is combined with the data that shows the favorability of printed media it is a reasonable assumption to speculate how face-to-face interaction combined with an easily viewable printed map or brochure is an excellent method to service guest requests for city and sights information. See Figure 4

Figure 4



In the age of mobile phones guests still look to the front desk for printed maps and attractions (55%) rather than kiosks (11%). The use of the Internet and kiosks at properties is much lower than hypothesized which suggests guests look to their own mobile Internet devices to conduct their own place-based research. However, this data suggests the importance of well-placed printed materials in displays to catch the attention of the guest and assist the front desk staff in their advice to guests on where to go and what to do while visiting. See Figure 5

Figure 5



Brochures are frequently used among hotel guest 40% Always, 46% Often, 13% Occasionally. Less than 1% of visitors completely disregard printed materials in their hotel. In addition only 1% of responders prefer web-based information provided by hotels and other properties, rather than printed materials.

### **Conclusion**

The data shows that hotel front desk staff in United States, Canada, France, Germany, Ireland and Greece) overwhelmingly favor brochure displays in their properties today. Hotel front desk staff much prefers to assist their guests with printed media. In particular, brochures and maps are almost equally popular to share with guests. Even hotels without displays often use printed media to help guests. Electronic kiosks are infrequently used and often supplemented by printed material within the hotel. Web-based information sources are seldom preferred by hotel front staff to assist their guests.

In the digital age, printed media is the most preferred and maps guides and brochures are a highly valuable support tool to supplement the local knowledge of the front desk and concierge team. The use of printed maps is interesting in the age of mobile apps for direction finding and suggests there is a shared connection with the concierge and the guest using a printed map together to highlight locations.

This survey data suggests that any hotel considering the removal of printed material from their property should think twice before acting. Data from the 2014 IAPBD study on Visitor information Usage and Effectiveness and the data is this current survey suggests printed material has a very useful and valuable role to play in the visitor and guest experience.

Appendix  
Survey Results

**Question 1:**

How important is providing your guests with visitor information, e.g. local attractions, shopping, etc.?

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 16                    | 1%  |
| (2)                          | 13                    | <1% |
| (3)                          | 57                    | 4%  |
| (4)                          | 202                   | 13% |
| Extremely Important (5)      | 1221                  | 81% |
| Missing (values not entered) | 51                    |     |
| total                        | 1560                  |     |

**Question 2:**

Do you have a brochure/ leaflet/ flyer display of visitor information at your location?

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Yes                          | 1433                  | 94% |
| No                           | 90                    | 6%  |
| Missing (values not entered) | 37                    |     |
| total                        | 1560                  |     |

**Question 3:**

Do you see value in having printed visitor information available for your guests?

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Yes                          | 1493                  | 98% |
| No                           | 31                    | 2%  |
| Missing (values not entered) | 36                    |     |
| total                        | 1560                  |     |

**Question 4:**

What visitor information services are you currently using to assist guests?

**Brochures/ leaflets/ flyers**

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 12                    | <1% |
| (2)                          | 12                    | <1% |
| (3)                          | 70                    | 5%  |
| (4)                          | 329                   | 23% |
| Extremely Important (5)      | 1018                  | 71% |
| NA                           | 14                    |     |
| Missing (values not entered) | 105                   |     |
| total                        | 1560                  |     |

## Hospitality Visitor Information Survey

### Printed Maps

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 11                    | <1% |
| (2)                          | 20                    | 1%  |
| (3)                          | 52                    | 4%  |
| (4)                          | 204                   | 15% |
| Extremely Important (5)      | 1095                  | 79% |
| NA                           | 59                    |     |
| Missing (values not entered) | 119                   |     |
| total                        | 1560                  |     |

### Printed Guides

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 23                    | 2%  |
| (2)                          | 32                    | 2%  |
| (3)                          | 133                   | 10% |
| (4)                          | 330                   | 25% |
| Extremely Important (5)      | 815                   | 61% |
| NA                           | 79                    |     |
| Missing (values not entered) | 148                   |     |
| total                        | 1560                  |     |

### Electronic Visitor Information Kiosk

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 153                   | 18% |
| (2)                          | 90                    | 11% |
| (3)                          | 161                   | 19% |
| (4)                          | 145                   | 17% |
| Extremely Important (5)      | 301                   | 35% |
| NA                           | 501                   |     |
| Missing (values not entered) | 209                   |     |
| total                        | 1560                  |     |

### In-Room Publications

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 108                   | 10% |
| (2)                          | 109                   | 10% |
| (3)                          | 201                   | 18% |
| (4)                          | 238                   | 22% |
| Extremely Important (5)      | 432                   | 40% |
| NA                           | 290                   |     |
| Missing (values not entered) | 182                   |     |
| total                        | 1560                  |     |

## Hospitality Visitor Information Survey

### Other/Please Specify Below

| Answer Choices               | Frequency of response | %   |
|------------------------------|-----------------------|-----|
| Not Important (1)            | 36                    | 19% |
| (2)                          | 5                     | 3%  |
| (3)                          | 12                    | 6%  |
| (4)                          | 22                    | 11% |
| Extremely Important (5)      | 118                   | 61% |
| NA                           | 396                   |     |
| Missing (values not entered) | 971                   |     |
| total                        | 1560                  |     |

### Question 5:

Please rate the frequency that brochures are utilized by your guests

| Answer Choices  | Frequency of response | %   |
|---|-----------------------|-----|
| Always  | 584                   | 40% |
| Often   | 665                   | 46% |
| Sometimes   | 196                   | 13% |
| Never   | 5                     | <1% |
| Never-I don't have brochures/leaflets/flyers available for my guests, however I wish we did | 2                     | <1% |
| Never-I don't have brochures/leaflets/flyers available for my guests                        | 9                     | <1% |
| Missing (values not entered)  | 99                    |     |
| total   | 1560                  |     |