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## **BDRC – Attractions Marketing Survey March 2008**

**Insight into the relative importance of  
the different media in the promotion of Attractions**



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Survey conducted by:



Report compiled by David Spelman, Take One Media.



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## Background

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- This research investigates whether some channels are more effective than others
- Involves 23 major attractions in the South-East
- 1,000 at least occasional attraction-visiting consumers in London and the South-East
- All residents in the UK; no international travellers
- Every three months
- Looks at whether some channels are more effective than others in attracting new consumers to the attractions by considering -
  - Awareness - What makes the customer aware of the attraction
  - Impact - What would make him visit or be very likely to visit
- The best performer individually is the one that achieves a good measure of awareness but also converts this into visits
- In reality, a good marketer will use a mix to achieve both awareness and impact - but will understand the role each has to play



## Profile of Sample interviewed by Type of Attraction

Attractions visited in the last 3 months (and intend to visit) –

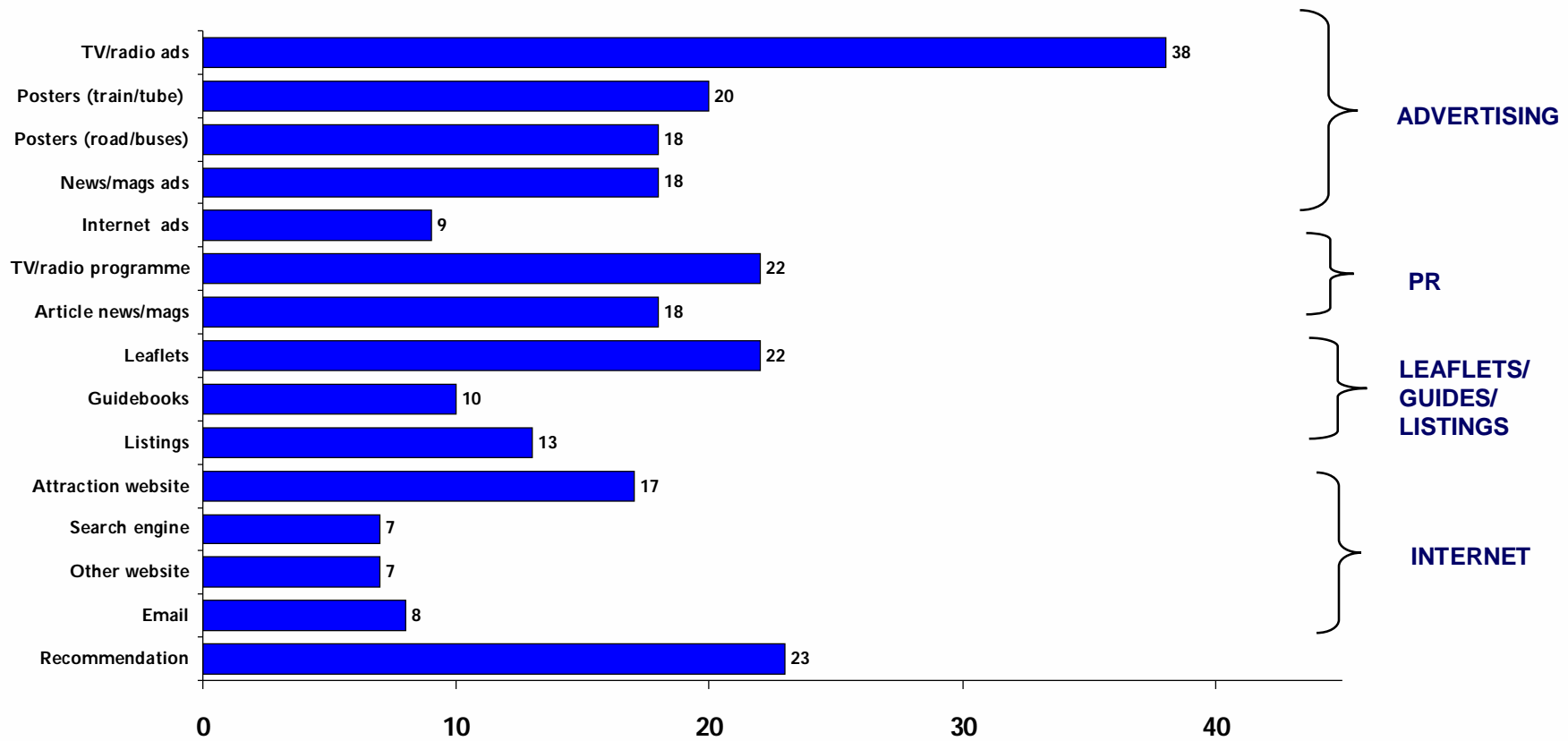
- **By Age –**

<b>Museums/galleries</b>	<b>41%</b>	<b>All age groups</b>
<b>Historic properties</b>	<b>29%</b>	<b>The older the age group the more visits.</b>
<b>Gardens</b>	<b>24%</b>	<b>Very low 16-24; and then as above. Grows significantly in older age groups within 'intending to visit'</b>
<b>Zoos/safari parks</b>	<b>23%</b>	<b>High for 25-44; very low older than this</b>
<b>Leisure/Theme Parks</b>	<b>20%</b>	<b>Very high for 16-24; and 25-44</b>
<b>None</b>	<b>26%</b>	<b>High for 16-24 and 55-65+</b>

- **By Presence of Children**

- Gardens equally visited by all groups
- Zoos/safaris very popular families with 0-10 year olds
- Leisure parks by those with 5-10 year olds on actual but 11-15 years features highly on intended
- Those with children over 11 less likely to visit anywhere
- Historic Properties and Gardens– strong with those with no children on intended (but not actual)

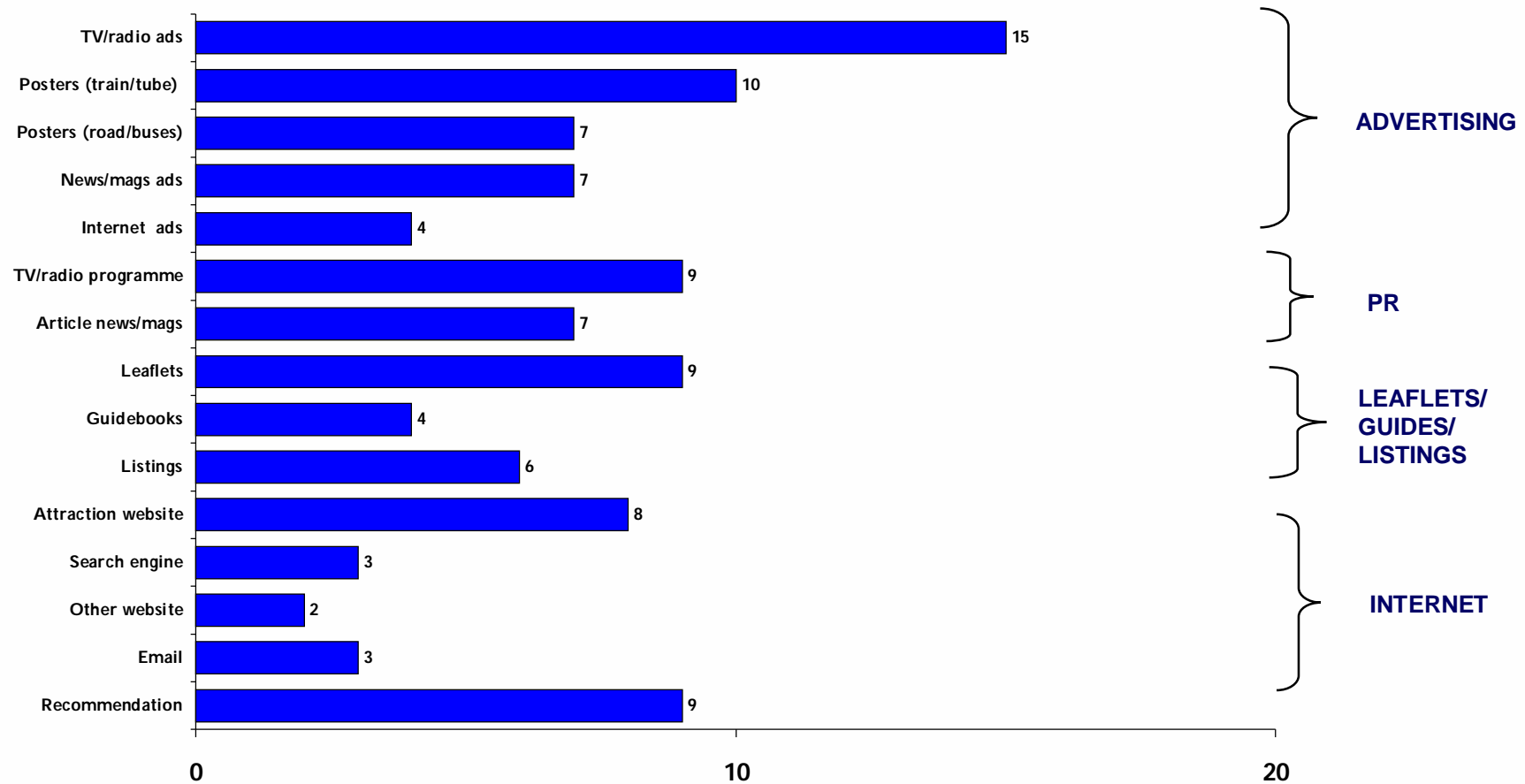
**22% had seen a leaflet** for one or more of the 23 attractions in the survey. In building awareness of attractions, leaflets are on a par with PR on TV or radio - after more expensive TV/Radio ads.



**AWARENESS - % of Adults seeing coverage recently for Attraction and through which media**

## Awareness of Communications

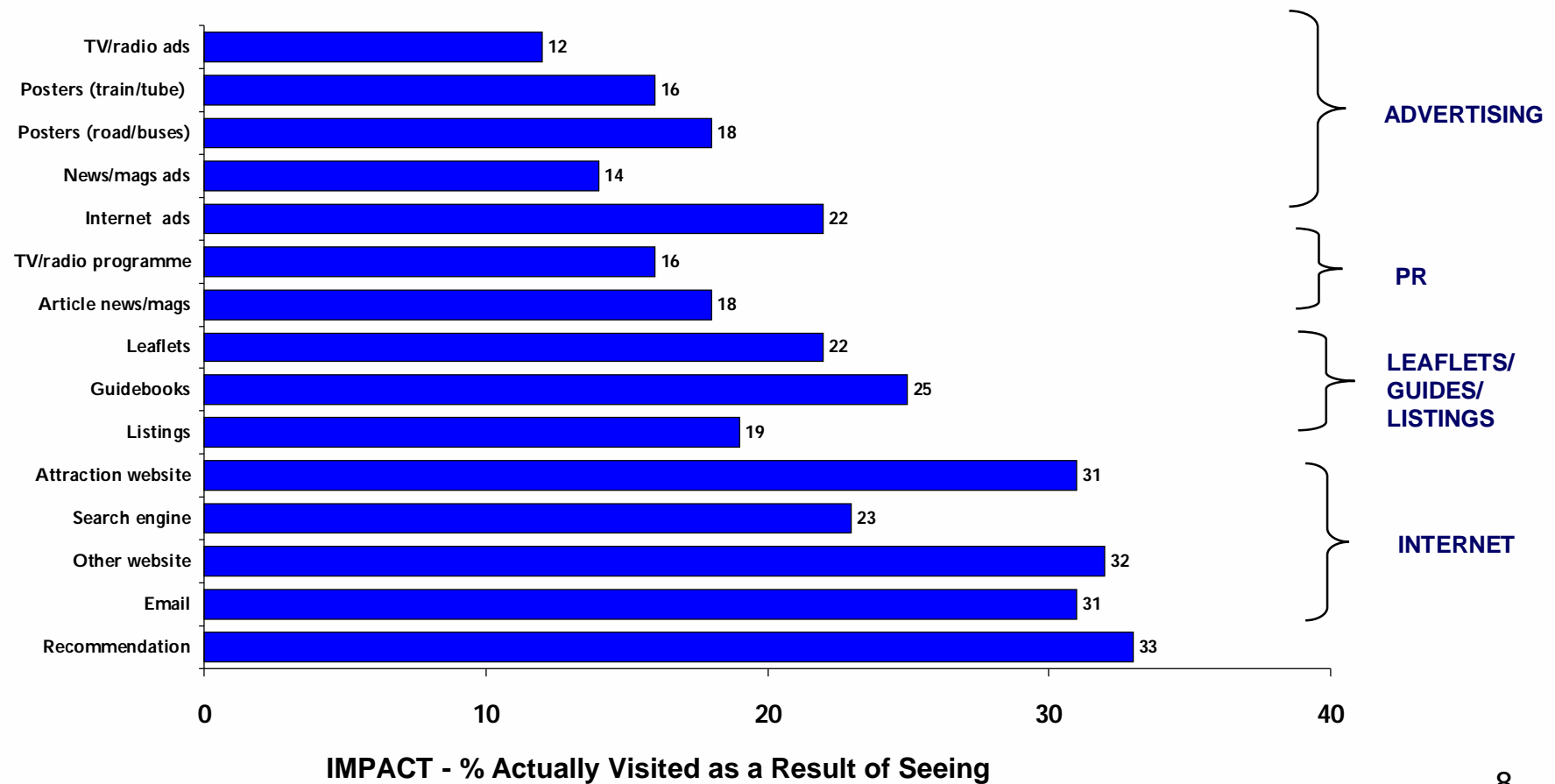
High cost TV/Radio/Poster ads come out top on this measure, which you would expect due to the high spend. PR on TV is second most important with **Leaflets being seen in 9% of cases.**



SHARE OF VOICE OF COVERAGE SEEN - % of all pieces of coverage

## Impact of Communications

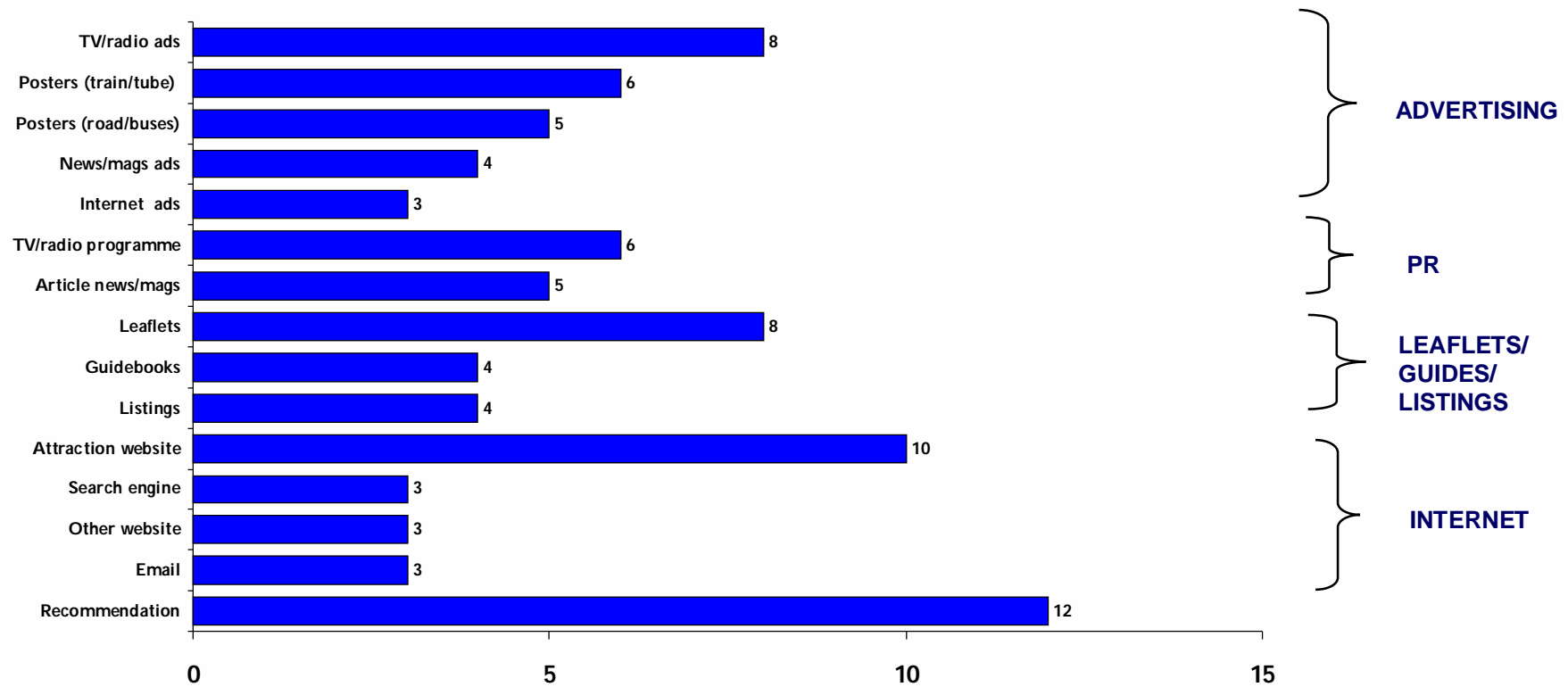
**22% had seen a leaflet** and 22% of those had visited as a result – easily ahead of all forms of advertising but behind attractions web-site, other web-site and e-mail





## Awareness & impact of Communications

**Leaflets second at 8%** just behind attractions web-site - so good way of achieving awareness AND impact (as measured by those visiting and likely to visit as a result of the leaflet)

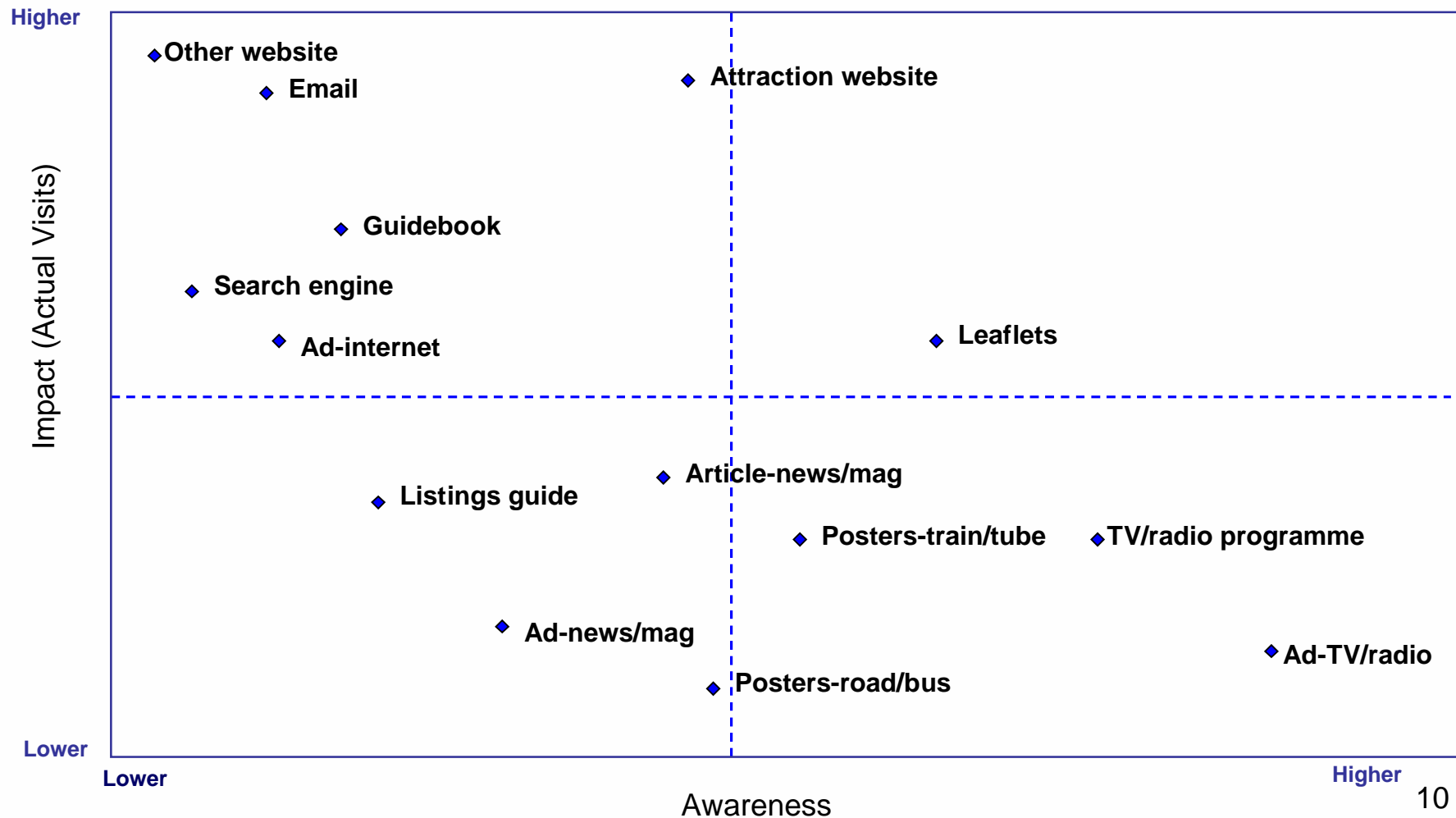


**AWARENESS AND IMPACT COMBINED - % seen AND then visit or more likely to visit (% against initial sample)**



# IMPACT – Mapping of each media on Awareness and Impact

Leaflets in top right quartile = good awareness together with good impact on visits





## Actual Visit Index in order of effectiveness on Awareness and Impact Combined

Recommendation	235
Attraction Website	194
<b>Leaflets</b>	<b>162</b>
Advertising on TV/Radio	152
Advertising Posters on trains	123
PR on TV/Radio	110
Advertising on road/buses	100
PR in magazine	99
Guidebooks	87
Listings	84
Exhibition/event	84
Advertising in newspapers/mags	81
Posters elsewhere	75
Road signs	68
Received email	67
Advertising on internet	64
Other web-site	58
Tour operator/agent	57
Search Engine	51
Other advertising	49

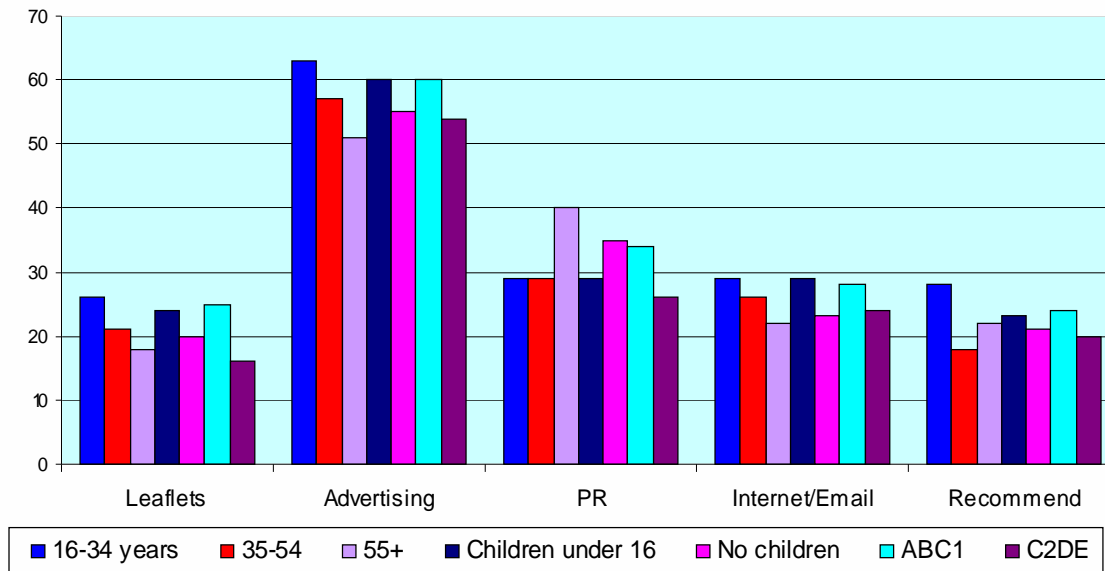
An index of 100 indicates that the effectiveness of that media is average relative to the other media – above 100 represents a greater than average impact, less than 100 represents a below average impact



## Profile of Users of Each Media

Leaflets represented across all groups with minimal differences – a slight tendency towards the younger age groups, those with children under 16 and ABC1.

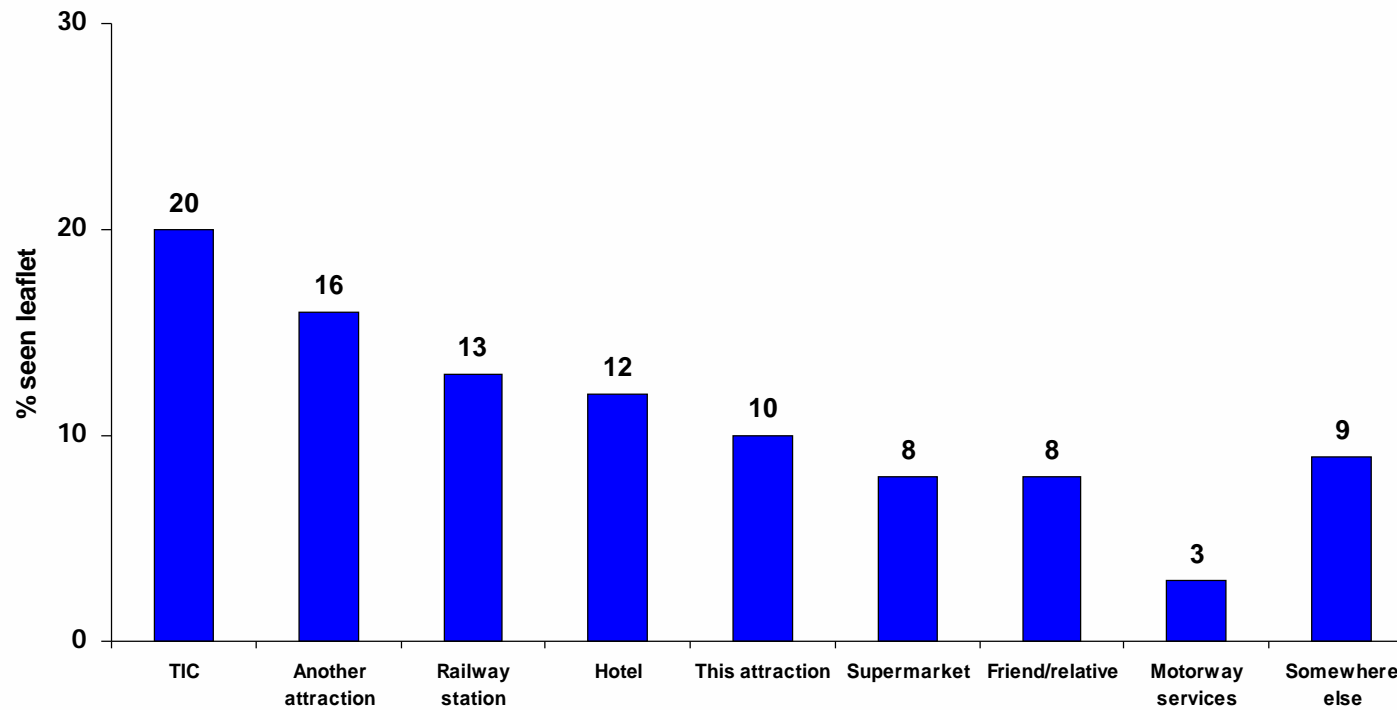
All other media show the same coverage; the only things to note is that PR is more important to the over 55's with no children, and the younger age groups are slightly more likely to have used internet or email as a source.





## Where Leaflets seen and % visiting as a result

Leaflets had been seen in TIC's by 20% – a surprise as all sample are UK residents; no overseas travellers. 16% were seen in another attraction. 12% were seen in hotels but conversion to visits was amongst the highest (see next chart). 8% had got the information from a friend or relative. 8% had got the information from a friend or relative. 3% had got the information from a friend or relative.

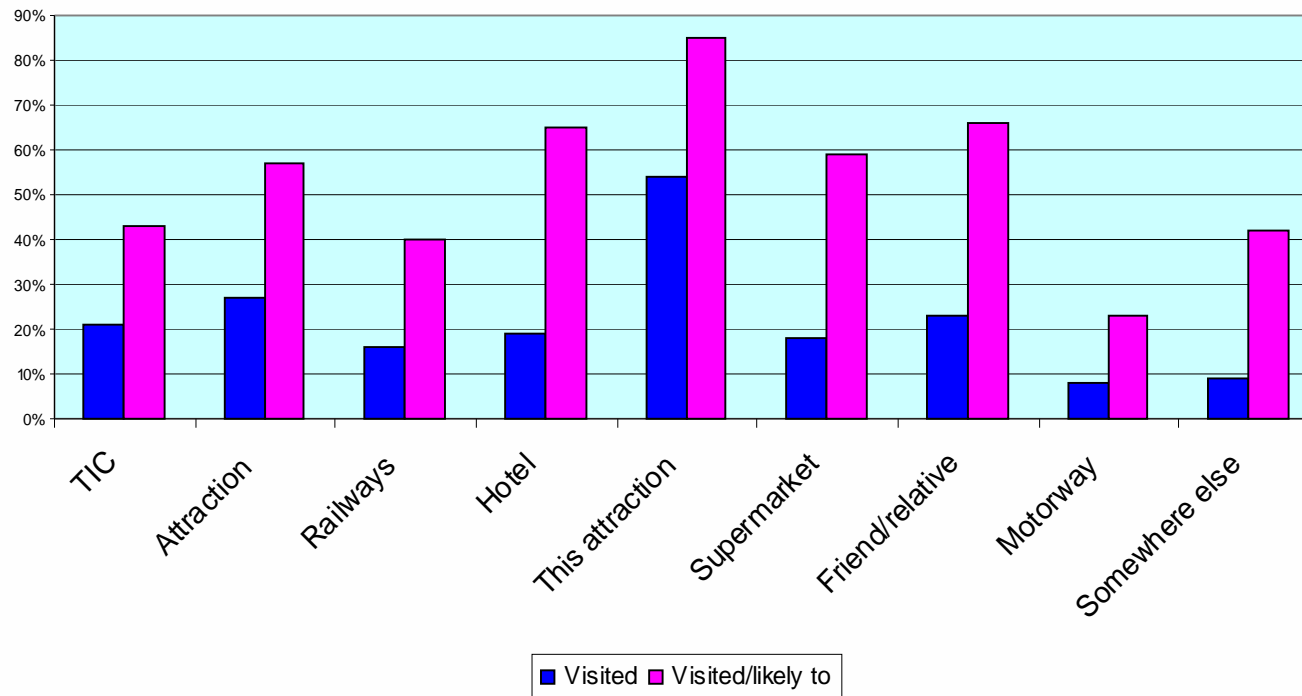




## Location of Pick-up of Leaflet and likelihood of visiting

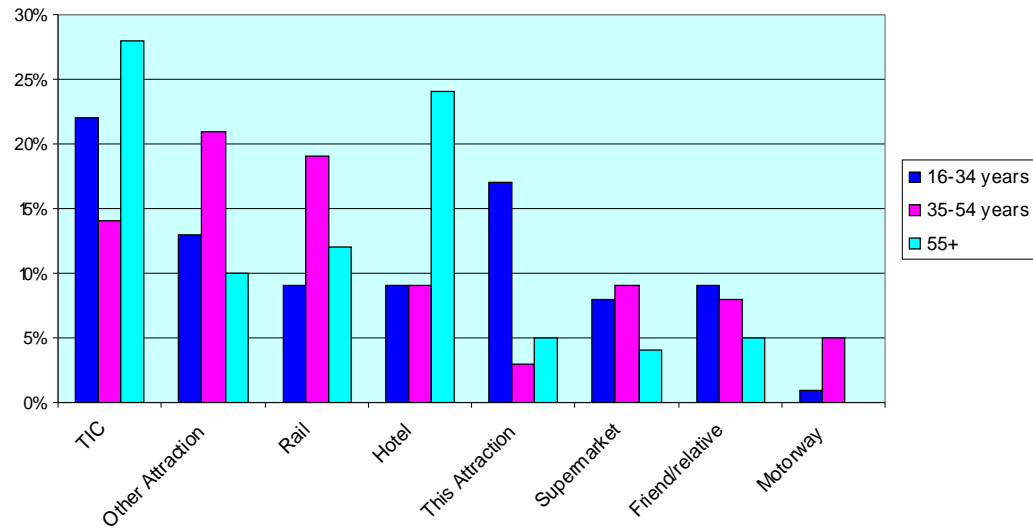
A leaflet picked up at another attraction resulted in the highest % of actual visits, with TIC and Hotels not far behind (ignore 'this attraction').

The likelihood of visiting as a result of picking up leaflet is quite high wherever picked up – Very high for leaflets picked up in hotels, and from friends; high for attractions and supermarkets; good for TIC and railways.

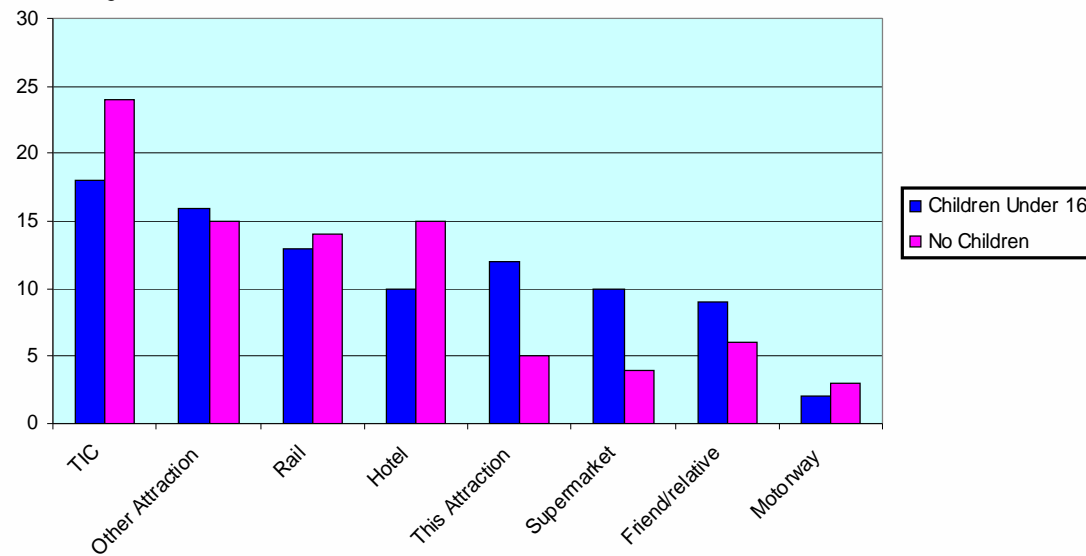




## Profile of Leaflet Pickup by location, age and presence of children

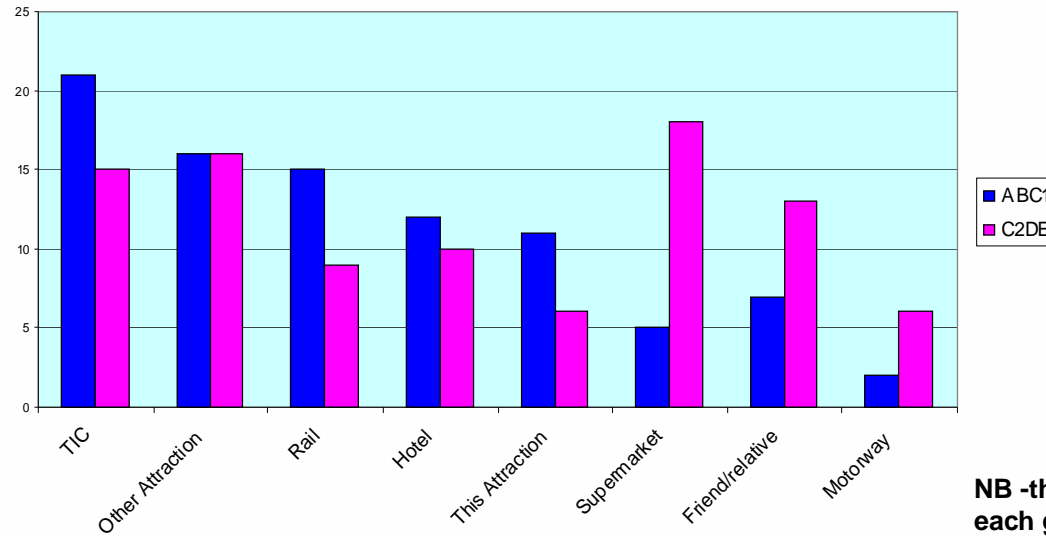


**NB -the size of the bars in relation to each other in each group is the key thing to look at here**

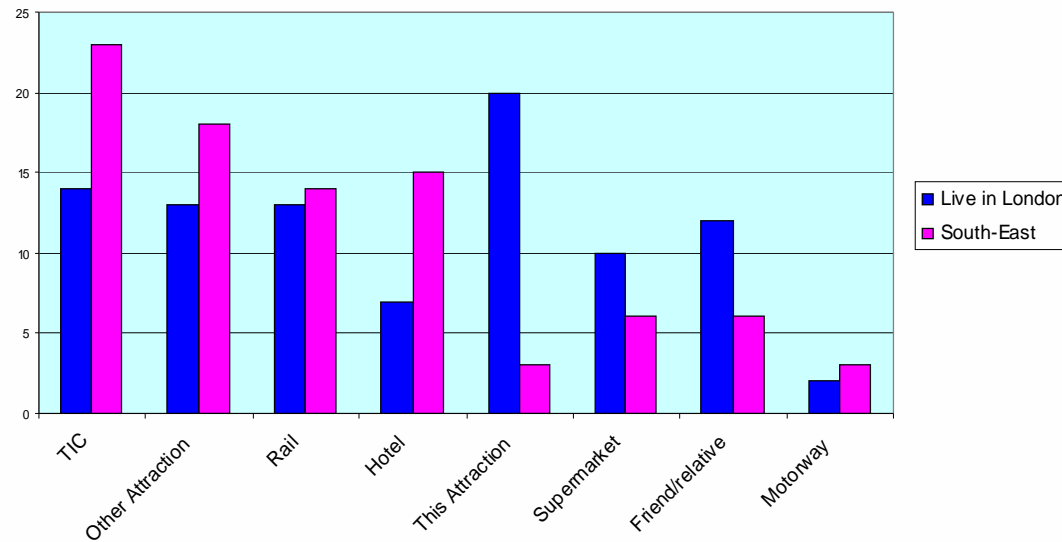




## Profile of Leaflet Pickup by location by Social Class and Living in London or not



**NB -the size of the bars in relation to each other in each group is the key thing to look at here**





## Summary of Results – The reach and Impact of leaflets

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- 22% of attraction-visiting adults have seen a leaflet for one of the attractions recently
- Most likely to have seen are ABC1, with children and those between 16-34 years
- 22% of those seeing a leaflet visited as a result
- And 32% said that they would be much more likely to visit – so 54% in total
- Leaflets have a higher impact upon initial awareness – reaching a greater spread of potential customers
- Web-based communications deliver a higher impact upon actual visits

**The most effective marketing campaign =  
Leaflets to achieve maximum reach; then web to consolidate interest and turn viewer into visitor.**

## Summary of Results – Where and When do Consumers see Leaflets?

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- Seen across a range of locations – 20% at TIC's, 16% at attractions at 16%, 12% at hotels
- Leaflets at TIC's – aged 55 +, no children, ABC1 and South-East (not London)
- 12% saw at a hotel – and have a similar profile to TIC's
- ABC1's more likely to see leaflets at TIC and stations; C2DE at supermarkets, service stations
- Leaflets at other attractions – highly effective – 57% visited/more likely to visit
- 66% of those given a leaflet by a friend/relative visit or likely to visit
- And 65% of those seeing a leaflet in a hotel visit or likely to visit
- Huge variation on time between seeing leaflet and visiting – 20% in the week before; 48% between 2 weeks and 3 months; 9% longer than this. ABC1 and those living in London show the shortest times



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**For further information and analysis contact:**

**Philippa Harris, Managing Director, Take One Media**

**David Spelman, Product & Marketing Manager, Take One Media**

**Take One Media**

**Orbital Park**

**Ashford**

**Kent TN24 0GA**

**T: 01233 211411**

**F: 01233 502898**

**[www.takeonemedia.co.uk](http://www.takeonemedia.co.uk)**

**[www.takeonemediaairports.co.uk](http://www.takeonemediaairports.co.uk)**