

The New Journey Travel Study, October 2013

Meredith Travel Marketing

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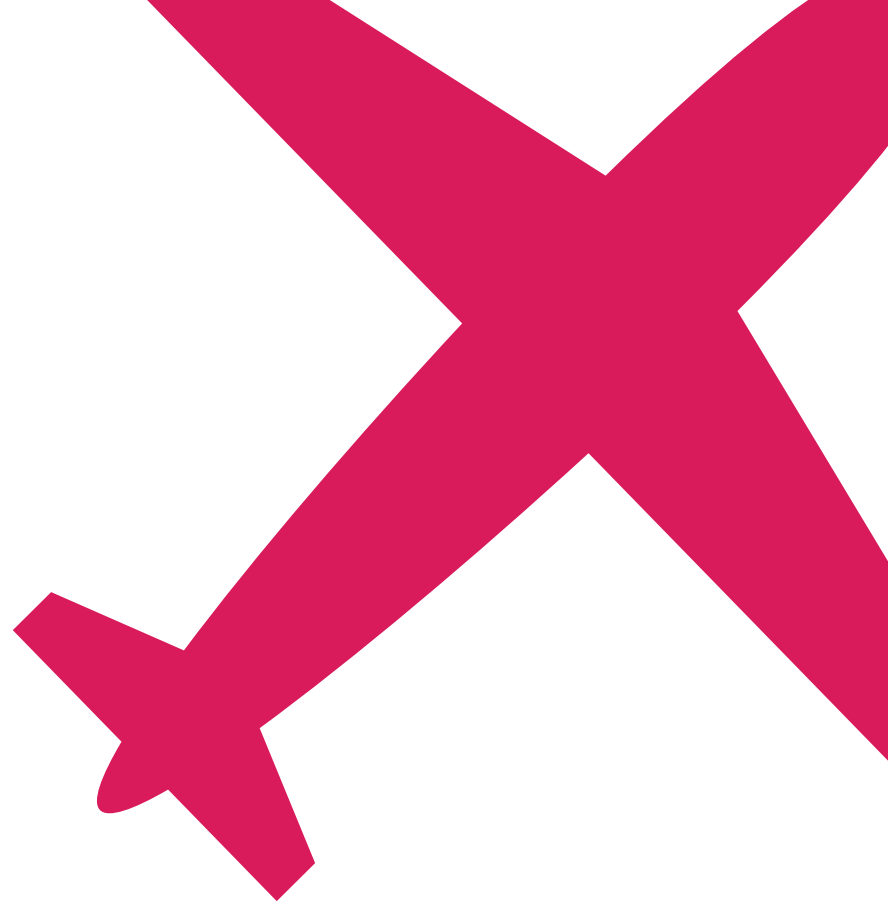
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meredith
travel marketing



THE NEW JOURNEY

Travel Study, October 2013



NATIONAL MEDIA BRANDS

Multi-Platform Brands



Digital Brands



Syndicated TV & Video



LOCAL MEDIA BRANDS



MARKETING SOLUTIONS

Meredith Xcelerated Marketing

- Digital Innovation & SEO
- Retail Activation & Experiential
- Social • Mobile • CRM • Analytics

Global Customer Engagement



Leading Capabilities

- Creative & Print Services
- Research & Consumer Insights
- Experiential Marketing
- Retail Promotions
- Hispanic Marketing
- Video Production & Distribution



Meredith Travel Marketing was formed to provide travel marketers with the very best of Meredith as it relates to travel from our:

- + Award-winning travel editorial
- + Extensive consumer research
- + Proven ability to activate and inspire over 100 million women

MEREDITH REACHES YOUR SWEET SPOT

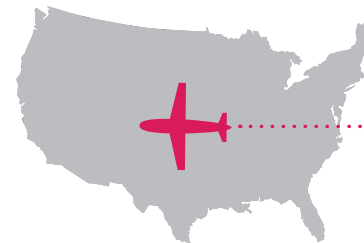


100 MILLION WOMEN
(1 OUT OF EVERY 2
WOMEN ENGAGE WITH
MEREDITH BRANDS)



SPENT **\$1 OUT OF EVERY \$2** OF ALL DOMESTIC TRAVEL

SPENT **\$53 BILLION**
ON VACATIONS IN
THE PAST YEAR



101.7 MILLION
TRIPS TAKEN IN
THE PAST YEAR
(HALF OF ALL
VACATIONS)



TRAVEL MARKETERS ARE ALWAYS ASKING...

- + How do consumers decide on their travel plans and destinations?
- + What inspires consumers to travel?
- + How can I effectively get the most out of the print media I select?
- + Can you help with my messaging?

Through the responses we learned so much more...



To address these questions, in December 2012, Meredith Travel Marketing commissioned Research Solutions, Inc. to tap into the “Meredith Knows Women” online consumer panel.

Sample of:

- + 15,074 Women across 12 Meredith brands
- + 300 U.S. Women
- + Median Age of respondent panel: 48
- + HHI of respondent panel: \$77,040

Response rate:

- + 11%

We uncovered a new process for consumers to engage with brands and demystify the purchase funnel.

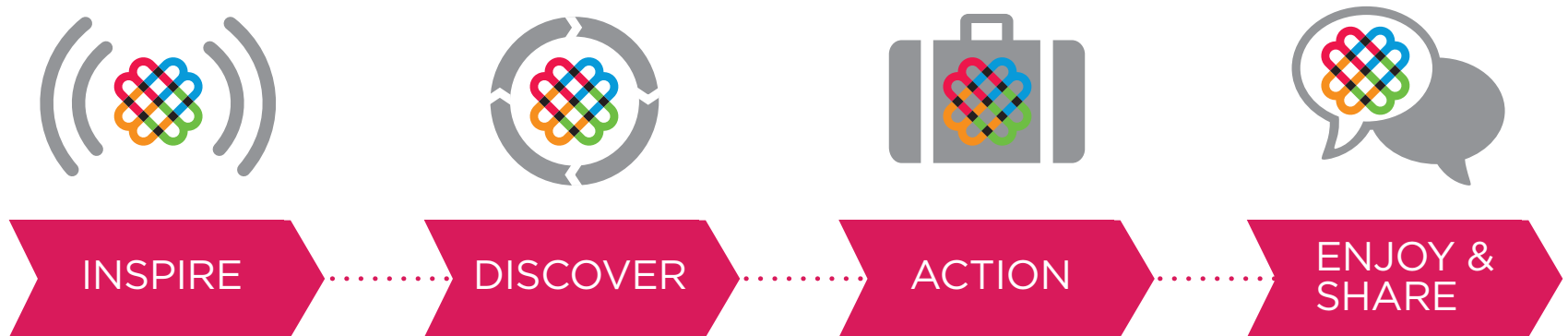
THE CONSUMER PROCESS HAS CHANGED

The Old Purchase Funnel



THE CONSUMER PROCESS HAS CHANGED

THE FOUR PHASES OF THE NEW JOURNEY



THE NEW JOURNEY

Phase 1: INSPIRE



- + The “dream” stage
- + We will uncover what inspires women to think about a vacation

Phase 2: DISCOVER



- + The labyrinth of product information
- + Ongoing process of endless options
- + Medium and message is key

Phase 3: ACTION



- + The first moment consumers are directly interacting with a brand
- + Trust plays a vital role

Phase 4: ENJOY & SHARE



- + Marketers must keep their brand promise
- + As the vacation begins, so does the conversation with friends and family

Phase 1:
INSPIRE



- + What inspires women to dream about a vacation?
- + Magazine brands are the classic stimulus for inspiration
- + It all begins here!

WHAT INSPIRES WOMEN TO TRAVEL?

TOP RESPONSES FOR MEREDITH CONSUMERS

Family and friend recommendations **(56%)**

Magazine ads, articles and websites (net) **(52%)**

Travel brochures **(31%)**

Destination websites **(30%)**

Travel books **(27%)**

Travel review websites **(26%)**

TV **(22%)**

TIP **Tip for Marketers:** Magazine brands are crucial in this “dream stage.”

WHAT ELEMENTS IN MAGAZINE ADS INFLUENCE DESTINATION CONSIDERATION?

TOP RESPONSES FOR MEREDITH CONSUMERS

Photographs **(62%)**

.....

A website to visit for more information **(60%)**

.....

A deal/special offer **(55%)**

.....

A price was featured **(43%)**

.....

The content was relevant to my lifestyle **(41%)**

.....

Testimonials from people like me **(22%)**

TIP

Tip for Marketers: Slight customization to a travel ad can lead to more effective advertising.

MEREDITH CONSUMERS TELL US WHAT THEY WANT TO SEE IN TRAVEL ADS

“**A picture is worth a thousand words.** Depicting the trip through visual pictures, accommodations, food, etc. definitely helps.”

“**Be more realistic.** People want to get the best deal for their money and while pictures are nice, it is as important to get the details in words.”

“**A picture of a family doing whatever the place is best known for** (i.e. being at the beach, water park, in the cabin by the fireplace, etc).”

“**A list of the best times of the year to visit.** What the weather is like during those times and any local festivals that are going on.”

“**I will ignore an ad that doesn't include internet information.**”

“**Keep the ads clutter-free** and include the most recognizable landmark of the area.”

WHAT DO READERS WANT FROM TRAVEL RELATED MAGAZINE ARTICLES?

TOP RESPONSES FOR MEREDITH CONSUMERS

Ideas for what to do during my stay **(66%)**

Photographs of the landscapes/area **(58%)**

Accommodations/lodging suggestions **(53%)**

Restaurant suggestions **(39%)**

Suggestions for what to avoid while on trip **(35%)**

A suggested travel itinerary **(33%)**

TIP

Tip for Marketers: It is important to be in front of magazine editors on a frequent basis.

CONSUMER DEMAND FOR MAGAZINES REMAINS HIGH

HIGH READERSHIP LEVELS:

- + Magazine readership among Adults 18+ grew 11% over the past 10 years¹

ROBUST MARKET DEMAND:

- + Nearly 7,400 consumer magazines were published in 2012²
- + 195 new titles were launched in 2012, an increase of 7% from 2011³

MAGAZINES APPEAL TO ALL GENERATIONS:

	AGE UNDER 25	AGE UNDER 35	AGE 35+	AGE 50+
ISSUES READ IN THE PAST MONTH (MEDIAN) ⁴	7.2	6.9	7.0	6.8

Sources: ¹MRI Fall 2003/2012; ²National Directory of Magazines/Oxbridge Communications, 2013; ³MediaFinder, 2013; ⁴GFK MRI, Fall 2012

Phase 2:
DISCOVER



- + “Zero Moment of Truth”
- + Labyrinth of product information
- + Medium, Messaging, Mix

“ZERO MOMENT OF TRUTH” (ZMOT)

- + Coined by Google in 2011
- + ZMOT is the moment consumers start researching and learning about a brand
- + Ongoing process using a variety of sources
- + The more information available, the more the consumer seeks

WHERE DO WOMEN LEARN ABOUT SPECIFIC TRAVEL DESTINATIONS?

TOP RESPONSES FOR MEREDITH CONSUMERS

Family and friend recommendations **(58%)**

Magazine ads, articles and websites (net) **(44%)**

Destination websites **(42%)**

Travel brochures **(35%)**

Travel review websites **(35%)**

Travel books **(34%)**

Booking agent websites **(27%)**

Facebook **(7%)**

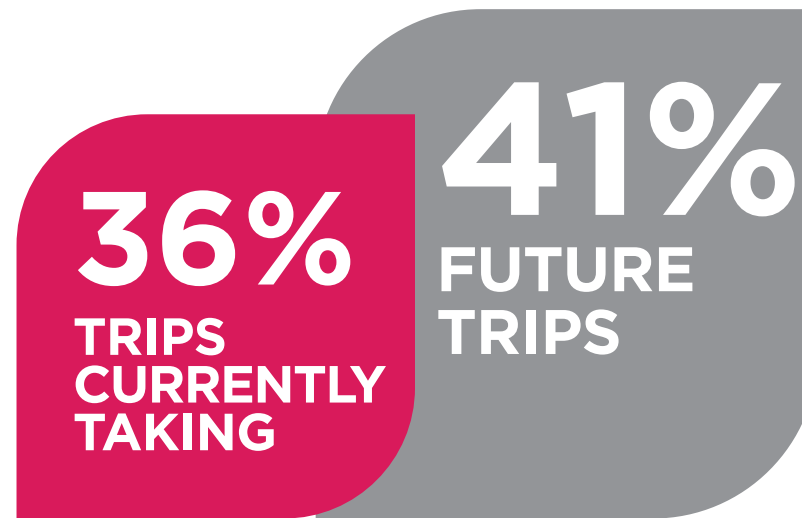
Online blogs **(6%)**

Pinterest **(5%)**

Twitter **(2%)**

TIP Tip for Marketers: Diversify your message.

THE IMPORTANCE OF MAGAZINE-RELATED SOURCES FOR TRAVELERS WILL INCREASE IN THE FUTURE



*Magazine-related sources include Magazine articles, Magazine ads and Magazine websites

TIP

Tip for Marketers: Magazine-related sources* continue to be a leading driver for consumers looking for travel information. Travel marketers need to recognize the value of these sources in their media mix.

PRINT MEDIUM IS CRUCIAL THROUGHOUT THE NEW JOURNEY

% Net Agree (Completely/Somewhat)

I find reviews from other people to be the best source for travel information

81%

I have considered traveling to a vacation destination after reading about it in a magazine article

76%

Travel ads in magazines often make me think of a destination I would have never thought of before

74%

I have considered traveling to a specific vacation destination after seeing it in a magazine advertisement

61%

I trust the travel information I find in magazines more than other media

41%

**MEREDITH
CONSUMERS**

TRUST AND A POSITIVE EXPERIENCE ARE VERY IMPORTANT

		MAGAZINES	TV	INTERNET	
POSITIVE DRIVERS	{ Ads provide useful information about new products and services	47%	54%	35%	
				
NEGATIVE DRIVERS	{ Ads have no credibility	20%	31%	31%	
				
		{ Ads appear at inconvenient moments	21%	50%	44%
				
{ All ads are alike	24%	33%	32%		
				
{ Ads are repeated often	28%	63%	45%		

Source: GFK MRI Fall 2012

PRINT-PLUS RATHER THAN PRINT

“While alternative media choices have emerged, particularly social and digital, magazines continue to be the primary source of information.

Magazines continue to be a crucial and dominant driver to brand websites.”

— Art Spinella, President CNW Research

MAGAZINES ARE MORE LIKELY TO DRIVE WOMEN ONLINE THAN OTHER MEDIA

TOP MEDIA THAT TRIGGER AN ONLINE SEARCH FOR WOMEN

Magazines **(39%)**

Face-to-Face **(37%)**

TV/Broadcast **(33%)**

Newspapers **(29%)**

TV/Cable **(27%)**

Direct Mail **(26%)**

Radio **(22%)**

Internet Advertising **(21%)**

Online/Social Media **(17%)**

Blogs **(9%)**

Phase 3:
ACTION



- + “First Moment of Truth”
- + Trust is paramount

“FIRST MOMENT OF TRUTH”

- + Coined by P&G in 2005
- + Identifies the first moment of interaction between a consumer and a brand

WHAT ACTION IS TAKEN AFTER SEEING A MAGAZINE TRAVEL ADVERTISEMENT?

	MEREDITH CONSUMERS	U.S. WOMEN	MEREDITH INDEX
Took any action (net)	77%	58%	122
Used a search engine to look for additional information	44%	30%	148
Went to the website listed/mentioned for more information	40%	25%	161
Sent for/requested a brochure	31%	17%	183
Cut out/clipped/flagged the ad/article for future reference	21%	8%	263
Went on a trip	14%	10%	133
Booked a trip online	12%	9%	130

TIP **Tip for Marketers:** Looking for results? Look to magazines.

An Infolinks study analyzing banner blindness revealed that **60% of respondents couldn't recall the last display ad they saw and only half of users ever click on online ads.**

— MediaPost 3/19/2013

WHERE DO WOMEN PUT THEIR TRUST?

MOST TRUSTED SOURCES FOR MEREDITH CONSUMERS

Family and friend recommendations **(99%)**

Travel books **(97%)**

Magazine articles, ads and websites (net) **(96%)**

Travel agent **(96%)**

Travel review websites **(95%)**

TIP

Tip for Marketers: TRUST LEADS TO ACTION! A trusted resource is a powerful tool, magazines deliver on trust.

Phase 4:
**ENJOY &
SHARE**



- + “Second Moment of Truth”
- + Did marketers deliver on the brand promise?
- + Enjoy the trip and share the memories

“SECOND MOMENT OF TRUTH” (SMOT)

- + The point when guests arrive and stay at your destination
- + Did marketers deliver on what they said they will do for consumers?
- + SMOT is key to generating new and repeat customers
- + Sharing of information and experiences never ends

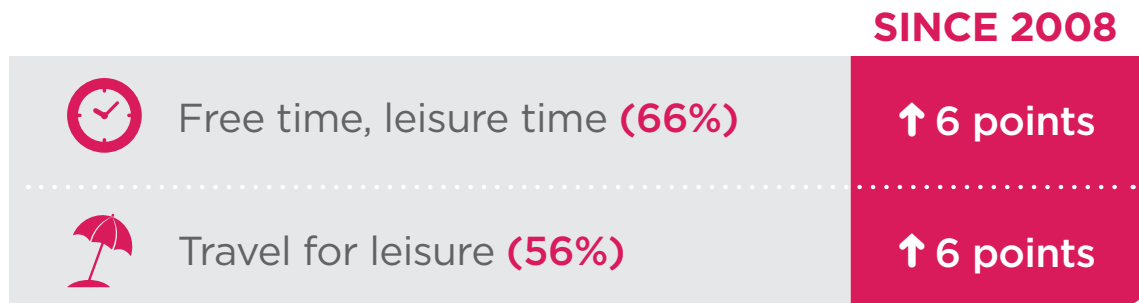
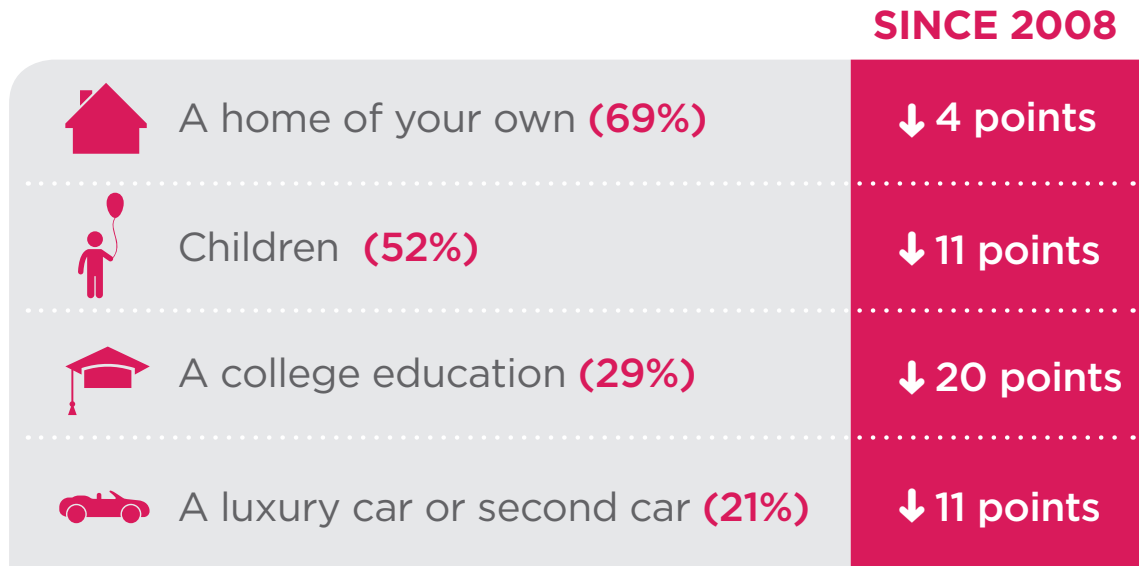
SOCIAL ISN'T SELLING

Customer loyalty, advocacy, engagement, interest and awareness are all important in the marketing funnel, but the assumption that they supercede the ‘baser’ activity of selling is pure hubris.

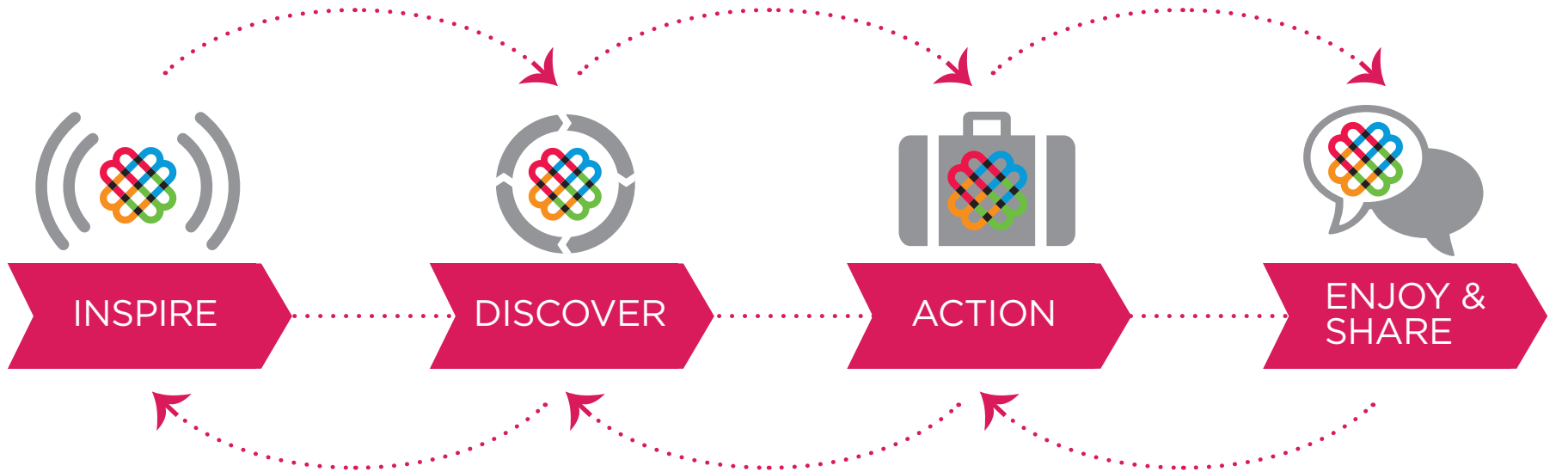
— Bob Knorpp, President of The Cool Beans Group,
Ad Age Opinion Page, 4/15/2013

TRAVEL = “THE GOOD LIFE”

Since the recession, Americans view of “The Good Life” has changed...



THE NEW JOURNEY



+ Magazines are a classic stimulus for inspiration

+ An infinite amount of information is available and can be overwhelming. Marketers need to focus on clear messaging and the right medium

+ Trusted magazine-based content and resources drive action

+ The travel “conversation” is ongoing and continues long after the return trip

SUMMARY

- + We have identified “A New Journey” for consumers and marketers
- + Magazine-branded sources play a crucial role in every phase of this journey
- + Consumers start planning vacations of 4+ days, 4 1/2 months in advance. They can be in any phase, at any time
- + Engage with magazine editors; they inspire women
- + Keep your travel message consistent and craft your message accordingly

MAKE YOUR CONNECTION



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ADDENDUM

THE NEW JOURNEY TRAVEL STUDY METHODOLOGY

- + **Methodology:** Meredith Corporation commissioned Research Solutions, Inc. to execute the research using standard online survey methods.
- + **Fieldwork:** November 19 – December 3, 2012
- + **Sample:**
 - 15,074 Meredith female readers age 18+ from the “Meredith Knows Women” consumer panel who take vacations
 - Across 12 Meredith brands
 - 300 U.S. Women age 18+ from Global Market Insite, Inc.
- + **Response Rate:** 11%

RESPONDENT PROFILE

	MEREDITH CONSUMER PANEL	U.S. WOMEN
Female	100%	100%
Median Age	48.1 years	47.0 years
Average Age	46.4 years	45.2 years
Age 18-34	20%	31%
Age 35-44	20%	18%
Age 45-54	30%	19%
Age 55+	29%	31%
Median HHI	\$77,040	\$49,600
Average HHI	\$93,840	\$60,570
Any Kids in HH < 18 (net)	35%	35%
Kids < 6 in HH	15%	15%
Kids 6-11 in HH	15%	14%
Kids 12-17 in HH	16%	15%

Source: 2012 MDP Travel Marketing Study

INSIGHTS FROM A BROAD CONSUMER BASE REACHING YOUR TARGET

