TODAY’S PRESENTATION

Will cover three things …

- What is the ‘visitor information journey’?
- What did our research tell us?
- How are we using the findings?
CITY OF MELBOURNE’S ROLE IN TOURISM

To engage and connect the visitor with the Melbourne experience ...

- Urban design and infrastructure
- Signage and wayfinding
- Maps
- Visitor information (brochures, itineraries, walks)
- Visitor services network

EXISTING RESEARCH

- Number of visitors to Melbourne is increasing
- Number of contacts with our face-to-face visitor services is decreasing
- Most users of our visitors services stumble upon us
- More visitors using digital devices
THE DIGITAL AGE

Investment ...

- All in digital?
- Face-to-face services and physical infrastructure?
- A spread of channels?

THE VISITOR INFORMATION JOURNEY
Visitor Information is personal

"The internet has so much information; it's hard to know if it's old or current information."

"we bring maps and ask Chinese speaking people for direction, if we can't find one, we ask by pointing and using body language"

"I don't go looking for the information! It has to find me"
“...there is no such thing as information overload, only filter failure...”

GARETH LLEWELLYN

Our Research Challenge

• Information for the visitor is abundant - but what do they really want, and when do they need it?

• Does everyone really want everything "online" these days?

• Does anyone know much about this area?
  – few studies cover the entire visitor journey or all types of information
  – No clear picture emerged about the roles of online and offline information within a single study

• A customised study was needed – but with different visitor segments, many different sources and channels – this is complex!
Research Approach

- We explored the sources and channels visitors used in a face-to-face intercept study \((n=100)\) while in Melbourne during May 2012.

- Our focus today is a larger online survey \((n=660)\) October 2012 with a broad snapshot of past and future visitors to Melbourne in the past/future 6 months.

- This was centred on just three elements of the visitor information journey:
  - Planning & booking
  - Travel to destination
  - On arrival
  - In destination
  - Departure / return home

Gather Before

Online & Mobile

Gather During

People & Print
Online survey with 660 recent + future visitors to Melbourne

- Australia n=372
- China n=132
- US n=59
- UK n=50
- NZ n=47

Panel Survey quotas:
- 67% past visitors; 33% future visitors
- 77% recreational trip; 23% business
- Most spending/planning to spend 3-5 nights

12 Key Topics

1. Shopping
2. General information
3. Dining + Restaurants
4. Transport
5. Regional information
6. What's on + things to see and do
7. Attractions
8. Maps
9. Traveller's information
10. Business information
11. Location of Information services
12. Accommodation

+ Online, Offline, People sources for all of the above
+ Technology used
The ‘information package’ approach is out of date

- Most information* is gathered Before the trip favouring online

- But other stages of the journey also require information, just different information

- The topics that are searched most across the journey tend to be...
  - Transport
  - Attractions
  - Maps

Information Topics Sought Before the Trip

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>79</td>
</tr>
<tr>
<td>Maps of Melbourne</td>
<td>65</td>
</tr>
<tr>
<td>Melbourne's attractions</td>
<td>65</td>
</tr>
<tr>
<td>What's on / things to see and do in Melbourne</td>
<td>62</td>
</tr>
<tr>
<td>Traveller information</td>
<td>58</td>
</tr>
<tr>
<td>Transport/getting around Melbourne</td>
<td>57</td>
</tr>
<tr>
<td>Things to see and do in regional Victoria</td>
<td>50</td>
</tr>
<tr>
<td>General information</td>
<td>44</td>
</tr>
<tr>
<td>Business information</td>
<td>40</td>
</tr>
<tr>
<td>Dining and restaurants</td>
<td>39</td>
</tr>
<tr>
<td>Where Visitor Services are located</td>
<td>34</td>
</tr>
<tr>
<td>Shopping</td>
<td>32</td>
</tr>
</tbody>
</table>
## Information Topics Sought on Arrival (% Total)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport/getting around Melbourne</td>
<td>60</td>
</tr>
<tr>
<td>General information</td>
<td>48</td>
</tr>
<tr>
<td>Dining and restaurants</td>
<td>46</td>
</tr>
<tr>
<td>Maps of Melbourne</td>
<td>46</td>
</tr>
<tr>
<td>Where Visitor Services are located</td>
<td>43</td>
</tr>
<tr>
<td>What's on / things to see and do in Melbourne (e.g. art exhibitions, theatre, cultural events or festivals)</td>
<td>34</td>
</tr>
<tr>
<td>Melbourne's attractions</td>
<td>34</td>
</tr>
<tr>
<td>Shopping</td>
<td>32</td>
</tr>
<tr>
<td>Traveller information</td>
<td>28</td>
</tr>
<tr>
<td>Business information</td>
<td>25</td>
</tr>
<tr>
<td>Things to see and do in regional Victoria</td>
<td>25</td>
</tr>
<tr>
<td>Accommodation</td>
<td>24</td>
</tr>
</tbody>
</table>

### Transport information is for locals not visitors

"We want to go to Camberwell Market and are told take the train to Camberwell station but we don’t know where the market is so we just follow the people. ....I finally saw Camberwell market but that is after I went to the blog from Taiwan"
### Information Topics Sought During the Trip (% Total)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>71</td>
</tr>
<tr>
<td>Dining and restaurants</td>
<td>69</td>
</tr>
<tr>
<td>Melbourne's attractions</td>
<td>55</td>
</tr>
<tr>
<td>General information</td>
<td>53</td>
</tr>
<tr>
<td>What's on / things to see and do in Melbourne (e.g. art exhibitions, theatre, cultural events or festivals)</td>
<td>51</td>
</tr>
<tr>
<td>Transport/getting around Melbourne</td>
<td>50</td>
</tr>
<tr>
<td>Maps of Melbourne</td>
<td>43</td>
</tr>
<tr>
<td>Things to see and do in regional Victoria</td>
<td>41</td>
</tr>
<tr>
<td>Where Visitor Services are located</td>
<td>33</td>
</tr>
<tr>
<td>Traveller information</td>
<td>24</td>
</tr>
<tr>
<td>Business information</td>
<td>22</td>
</tr>
<tr>
<td>Accommodation</td>
<td>20</td>
</tr>
</tbody>
</table>

### Even the slightest news about shopping is news

"the new Kikki K store near my hotel is news for me"
There is no longer a predictable path to information

- Sources or channels that people prefer also reflect the stage of journey
- These may not necessarily connected or used in sequence.
- Visitors will differ in how they access information and in what order.
- Traditional sources are surprisingly important

Top Information Sources used *Before the trip* (% Total)

- Digital map websites/apps: 79%
- Official government tourism websites/apps/Facebook pages: 63%
- Accommodation staff: 62%
- Commercial tourism destination websites/apps/Facebook pages: 61%
- Travel websites or sightseeing apps: 81%
- Airline or airport information websites/apps: 57%
- Printed maps of Melbourne: 57%
- Event booking websites: 57%
- Traveller review blogs or forums websites/apps/Facebook pages: 54%
- Public transport operator websites/apps: 51%
- Travel guidebooks: 50% *Total all topics*
Top Information Sources used On Arrival

<table>
<thead>
<tr>
<th>Source</th>
<th>% Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist brochures</td>
<td>62</td>
</tr>
<tr>
<td>Accommodation staff</td>
<td>62</td>
</tr>
<tr>
<td>Printed maps of Melbourne</td>
<td>55</td>
</tr>
<tr>
<td>Digital map websites/apps</td>
<td>54</td>
</tr>
<tr>
<td>Hotel publications / in-room information</td>
<td>51</td>
</tr>
<tr>
<td>Public transport operator websites/apps</td>
<td>49</td>
</tr>
<tr>
<td>Transport information brochures and packs</td>
<td>49</td>
</tr>
<tr>
<td>Street signage</td>
<td>46</td>
</tr>
<tr>
<td>Terminal staff</td>
<td>46</td>
</tr>
<tr>
<td>Airport, train and cruise ship terminal signage</td>
<td>45</td>
</tr>
<tr>
<td>Commercial tourism destination websites/apps/Facebook pages</td>
<td>44</td>
</tr>
</tbody>
</table>

*Total all topics

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Power of print + Face to face

"I like to have the Melbourne guide in my bag and take it everywhere with me, it's the most up-to-date source"

"Visitor information staff tell you the truth, they aren't selling you anything. Yes, they would be the most credible source"
Top Information Sources used During the Trip

(% Total)

- Tourist brochures: 68%
- Digital map websites/apps: 63%
- Street signage: 55%
- Accommodation staff: 54%
- Printed maps of Melbourne: 53%
- Locals who live or work in Melbourne: 50%
- Transport information brochures and packs: 49%
- Travel websites or sightseeing apps: 48%
- Visitor Information Centres in Melbourne CBD: 47%
- Public transport operator websites/apps: 46%
- Transport workers: 46%

*Total all topics

"City of Melbourne should provide Wi-Fi at the Visitor Information Centre."
<table>
<thead>
<tr>
<th>Government sites</th>
<th>Visitor information services in CBD</th>
<th>Visitor Information services in regions/interstate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maps</td>
<td>55</td>
<td>36</td>
</tr>
<tr>
<td>Bus info</td>
<td>51</td>
<td>38</td>
</tr>
<tr>
<td>Transport</td>
<td>50</td>
<td>41</td>
</tr>
<tr>
<td>Attractions</td>
<td>67</td>
<td>36</td>
</tr>
</tbody>
</table>
| What's On                     | 60                                  | 45                                            | **54**
| Dining                        | 50                                  | 40                                            | **54**
| Shopping                      | 45                                  | 47                                            | **45**
| Accommodation                 | 42                                  | 29                                            | **36**
| Gen Info                      | 54                                  | 44                                            | **35**
| What to do - Regional         | 63                                  | 44                                            | **35**
| Traveller info                | 67                                  | 49                                            | **35**
| Where VIC's are               | 65                                  | 45                                            | **38**

% used at any stage

"The information centre is the best because you can have a chat and get directions."
Technology patterns over the journey

"I mapped all my interests and placed them as pinpoints on a Google map."

"I mainly use my phone – it's portable, I have it on me anyway. I live on the phone!"

Nitty Gritty Insight & Research
We also explored use of:

LinkedIn, Twitter, YouTube, Pinterest, TripAdvisor, Instagram, Facebook, Flickr

Social Media used heavily across the Journey

<table>
<thead>
<tr>
<th></th>
<th>Before</th>
<th>On Arrival</th>
<th>During Trip</th>
<th>On Departure</th>
<th>Return Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Total sample</td>
<td>78</td>
<td>63</td>
<td>83</td>
<td>48</td>
<td>59</td>
</tr>
</tbody>
</table>
Favoured Social Media Channels

- Facebook: 78%
- Twitter: 35%
- LinkedIn: 26%
- Instagram: 11%
- Flickr: 10%
- Pinterest: 10%

***
Chinese Visitors: 66% use Twitter (Weibo)

Social media

- **Before the trip**
  - Source traveller + ‘insider’ opinions, download reviews

- **On arrival**
  - Access local visitor information services

- **During the trip**
  - Update and check into Facebook, use Twitter

- **On departure**
  - Update Facebook, attractions, update Twitter

- **On return home**
  - Post reviews, update Facebook photos
There is no longer a stereotypical visitor wanting certain ‘standard’ experiences.

### Attitudes to visiting Melbourne

- Planned around an event or occasion: 54% agree
- Mostly off the beaten track where tourists don’t go: 53%
- Designed to experience the culture and city life in Melbourne – the hidden attractions including bars, laneways etc: 50%
- Planned around visiting the major tourist attractions in Melbourne that everyone wants to see: 50%
- Largely unplanned to enable spur of the moment activities: 49%

(Total % agree/agree strongly)

- Total (n=660)
- Australians (n=288)
- Chinese travellers (n=132)
- OS English speaking (n=156)

1. Visitors prefer VISITOR CENTRIC INFORMATION in all forms, so don’t throw the baby out with the bathwater.

2. Information before the journey is a key area to engage early (and one of the most confusing)

   Clear branding of content online is important

3. Social media strategy must also reflect the stage of journey

   Do some well rather than try to do all
Visitors want information that is current, accessible and easy to use – this varies according to the stage of their journey.

MOSTLY THEY ARE SEEKING OPINION
NOT INFORMATION

Thank you
The Visitor Information Journey

Kirsten Nuez-Homboek
Partnerships & Communications Coordinator
Tourism Melbourne

THE VISITOR INFORMATION JOURNEY ACTION PLAN

Visitor Information and Channels Preferences Study

City of Melbourne's Visitor Information Journey Action Plan
THE VISITOR INFORMATION JOURNEY ACTION PLAN

Brief overview of projects underway or scheduled for 2013/14

Enable easy orientation & navigation
- Create a single map for Melbourne
- Available throughout the journey

Capitalise on social media & online channels
- Social media presence for the visitor services
- Optimise content & functionality of digital assets

Build on relationships with destination experts
- Share content & resources

Ensure cultural & language sensitivity
- Translated & culturally appropriate content
- Cultural training for staff & volunteers
THE VISITOR INFORMATION JOURNEY ACTION PLAN

Brief overview of projects underway or scheduled for 2013/14

Empower locals to become destination champions
- Connect locals with current & engaging content
- Encourage locals to share their insider's knowledge

Improve inbound content provision
- Provide visitors with orientation information enroute to destination

Make a good first impression
- Improve the arrivals information experience for visitors

Improve visitor access to WIFI
- WIFI access in the Melbourne Visitor Centre
- Explore options for access via visitor transport & hotspots

Provide mobile visitor services
- Trial of information desk at major conferences

Improve visitor way finding
- Develop new signage & way finding for the city

Capitalise on visitor generated content
- Encourage visitors to share experience of city & utilise content in various channels
The Visitor Information Journey

Barry McGuren
Branch Manager
Tourism Melbourne
Questions?