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The Changing World of Destination Market Research: A Comparison of Methods Utilized in Driving Traffic to an Online Survey

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ABSTRACT

In March of 2011, a study on visitors to Tioga County, PA was launched to understand visitor types, the effectiveness of recent advertising campaigns, and the economic impact and ROI of tourism spending in Tioga County. The research design utilized four distribution methods in driving respondents to an online survey link; the link was e-mailed directly to 2,400 inquiry e-mail addresses, a postcard advertising the link was sent to 3,700 mailing addresses, and the link was posted on the Tioga County Visitors Bureau website and Facebook page. This paper explores implications for response rates by distribution method, online survey reliability and population representativeness based on the Tioga County Visitor Study results.

Keywords: *Destination research, online survey methods, survey distribution, visitor research, advertising effectiveness, ROI*

INTRODUCTION

Before the advent of the internet, consumer and market research was relatively straightforward and simple. From the beginning of market research in the 1920s to around the 1990s, equal access to consumers was achieved by mailed surveys and random digit dialing telephone surveys. Changing technology has not only changed the way we as consumers access information, but how market researchers access consumers. Since the beginning of the 21st century when the use of e-mail and search engines became widespread to the creation of Facebook and other social networks, changes in technology are changing the way consumer research is done. On one hand, technological advances including the internet and the widespread use of online social networks have allowed researchers to conduct consumer research faster and less expensively than ever before. On the other hand, the same online advances have created challenges in reliability and representation because access to information, and thus consumer groups, has become fragmented.

As of 2010, 77.3% of the U.S. population is active on the internet (International Telecommunication Union). Clearly the internet is as widespread and mainstream an access point for consumers as mail and landline telephone used to be.

Table 1
Internet Usage and Population Growth

YEAR	Population	Users	% Pop.	Broadband	Usage Source
2000	281,421,906	124,000,000	44.1 %	n/a	ITU
2001	285,317,559	142,823,008	50.0 %	n/a	ITU
2002	288,368,698	167,196,688	58.0 %	n/a	ITU
2003	290,809,777	172,250,000	59.2 %	n/a	ITU
2004	293,271,500	201,661,159	68.8 %	n/a	Nielsen Online
2005	299,093,237	203,824,428	68.1 %	n/a	Nielsen Online
2007	301,967,681	212,080,135	70.2 %	n/a	Nielsen Online
2008	303,824,646	220,141,969	72.5 %	n/a	Nielsen Online
2009	307,212,123	227,719,000	74.1 %	n/a	Nielsen Online
2010	310,232,863	239,893,600	77.3 %	85,287,100	ITU

G.N.I.p.c. = Per Capita Gross National Income in US dollars, [historic series](#).

<http://www.internetworldstats.com/am/us.htm>

At the same time, online surveys have been celebrated for their speed in delivering results, high response rates and low cost relative to paper and phone surveys. However, findings on the reliability of online surveys versus paper surveys have been inconclusive with some researchers finding discrepancies and some researchers finding consistencies (Cole 2005, Pan 2010).

Recent research on the validity and reliability of online survey methods when reaching traveling consumers suggests that no differences exist in the contamination of data by response styles, and that neither online surveys nor paper surveys are unbiased (Dolnicar et.al, 2009). Thus, with costs and benefits considered, online surveys may potentially be considered to be at least as reliable and valid as other, more traditional methods. However, the challenge of online surveys has been one of online consumer access. Which online channels of access are most likely to yield samples that are representative of the true visitor population? How can we be sure that online surveys are reaching the highest number of visitors and possible visitors?

This study provides supporting data for earlier research that suggests that internet-based sampling procedures create a substantial potential for bias, and further illustrates the point that when working with online surveys, a multi-modal approach to consumer channels is recommended to drive traffic to an online survey (Hwang 2004).

METHODOLOGY

This study measured ROI and evaluated visitor patterns among visitors to Tioga County, PA, home of the “Grand Canyon of Pennsylvania” and a strong destination for outdoor activity travelers. A multi-modal approach to survey distribution utilized inquiry mailing addresses and e-mail addresses as well as places on the web affiliated with Tioga County such as the visitors bureau website and Facebook page.

First, postcards advertising the survey link were mailed to 3,700 inquirers who provided the visitors bureau with only a mailing address. At the same time, the survey link was e-mailed to 2,400 inquirers who provided an e-mail address. Records represent inquirers from 1/1/09 –

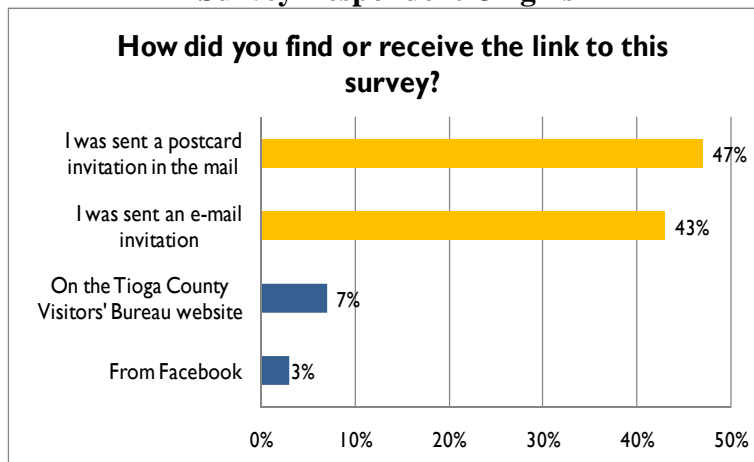
12/17/10. Lastly, the survey link was posted on the Bureau’s website and Facebook page. All survey respondents were offered a chance to win \$200 in VISA gift cards if they took a survey about their experience visiting and/or plans to visit Tioga County. The survey was open from February 17-March 3, 2011. Response rates for the survey included 535 respondents, containing 376 previous visitors to Tioga County. Statistical significance was calculated at 95% +/-5.05, based on an estimated population of 1,000,000 annual visitors to Tioga County.

Survey topics evaluated advertising reach, recall and influence; the relative effectiveness of various media channels; visitation patterns of behavior; and visitor spending. Supporting visitor data was cross tabulated with respondents’ primary visitation purpose in order to more fully understand visitor types. Reported spending data was cross tabulated with survey methods utilized in order to examine variability between methods.

RESULTS

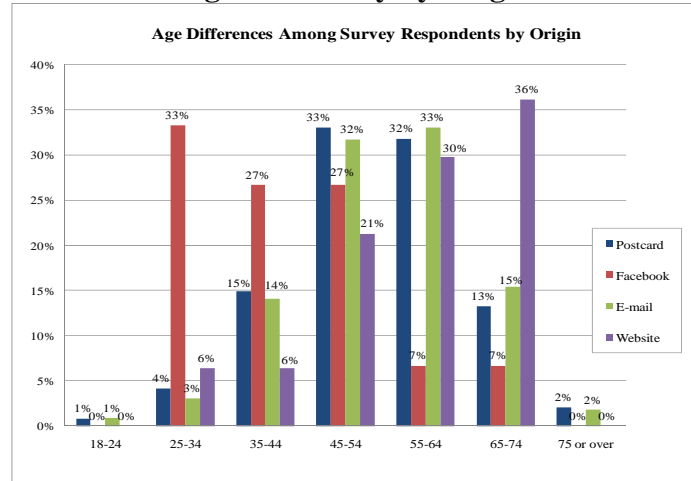
Of the 535 survey responses gathered, 47% had received a postcard invitation (251 respondents), 43% had received an e-mail invitation (230 respondents), 7% originated from the website (37 respondents), and 3% originated from Facebook (16 respondents).

Table 2
Survey Respondent Origins



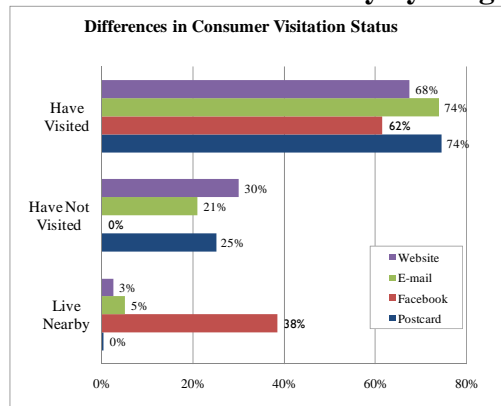
Most respondents were female (52%), between the ages of 45-63 (64%) and reported between \$50-100,000 annual income (53%). Results showed a positive correlation between age and those who responded to the survey from the website, and a negative correlation between age and those who responded to the survey from Facebook. In other words, Facebook respondents were more likely to be younger (33% were 25-34) while website respondents were more likely to be older (36% were 65-74) (See Table 3). Postcard and e-mail respondent groups showed no significant differences in age.

Table 3
Age Variability by Origin



Consumers were more likely to have visited Tioga County if they received an e-mail or postcard, but not by a wide margin. Facebook fan respondents were either visitors or residents (no visitors in their planning stages were found on Facebook) (See Table 5).

Table 4
Visitation Status Variability by Origin



Although overall, only 7% of respondents first became aware of Tioga County through an advertisement, 44% recall seeing an ad, and 55% of those who had visited were influenced by an ad in their decision to visit. Results indicate that besides Facebook, which seems to have a more locally oriented audience, results don't vary widely between those who took the survey from the website, those who went online to take it after receiving a postcard, and those who received a link in their e-mail (Table 5, 6, and 7). However, there is some subtle behavioral variability between those who received a postcard and other groups: postcard respondents were less likely to recall seeing an ad but more likely to have been influence by one; more likely to have become aware of Tioga County through Pennsylvania visitor information, and more likely to have visited Tioga County for its main attraction: Pennsylvania's Grand Canyon (Table 8).

Facebook respondents were more likely to live nearby, to have recalled seeing an advertisement, and to have visited Tioga County to visit friends and family.

Table 5
Ad Recall Variability by Origin

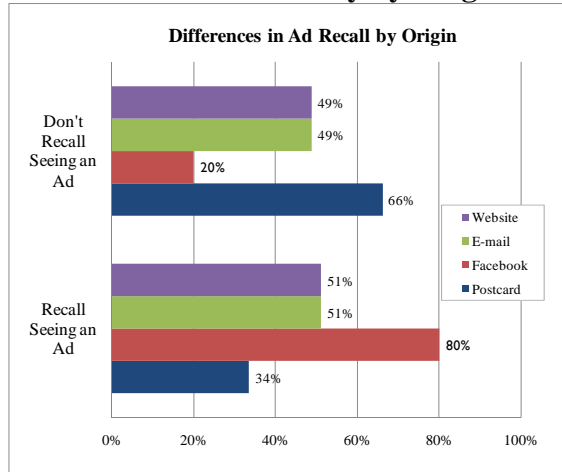


Table 6
Initial Awareness Variability by Origin

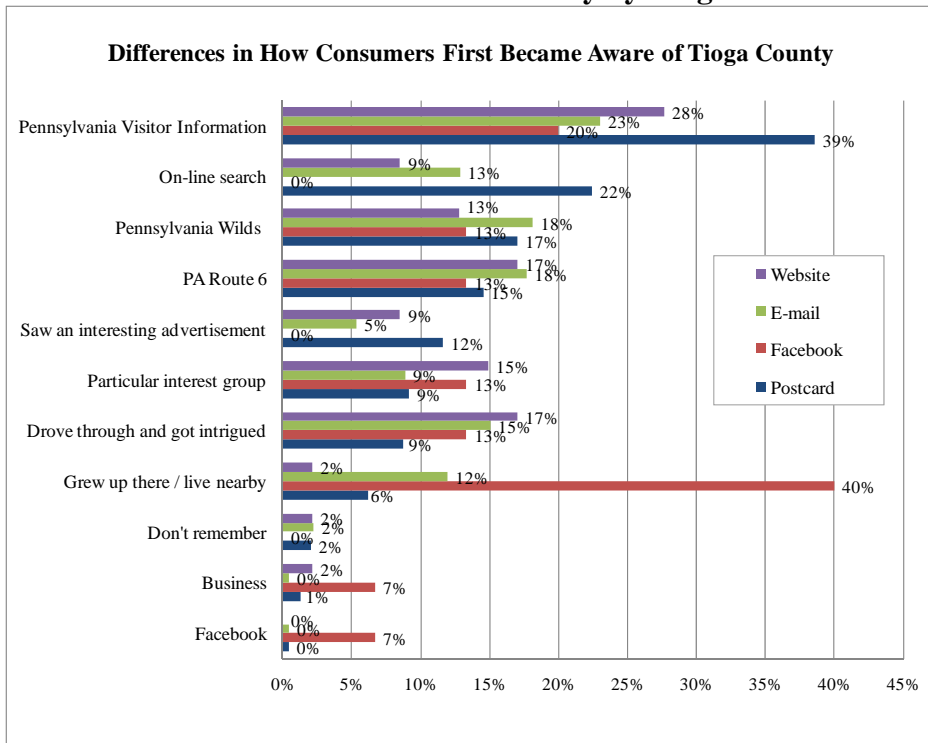


Table 7
Variations in the level of Advertising Influence

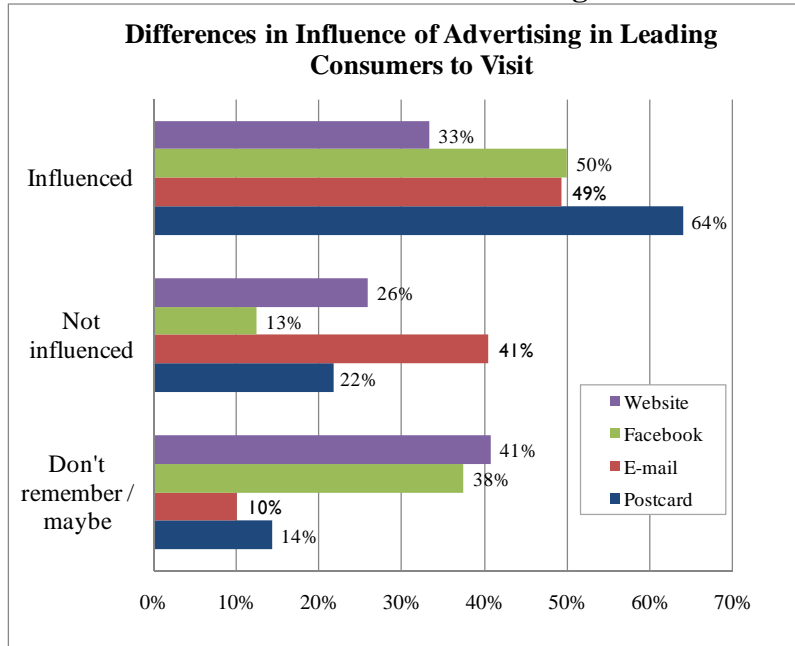
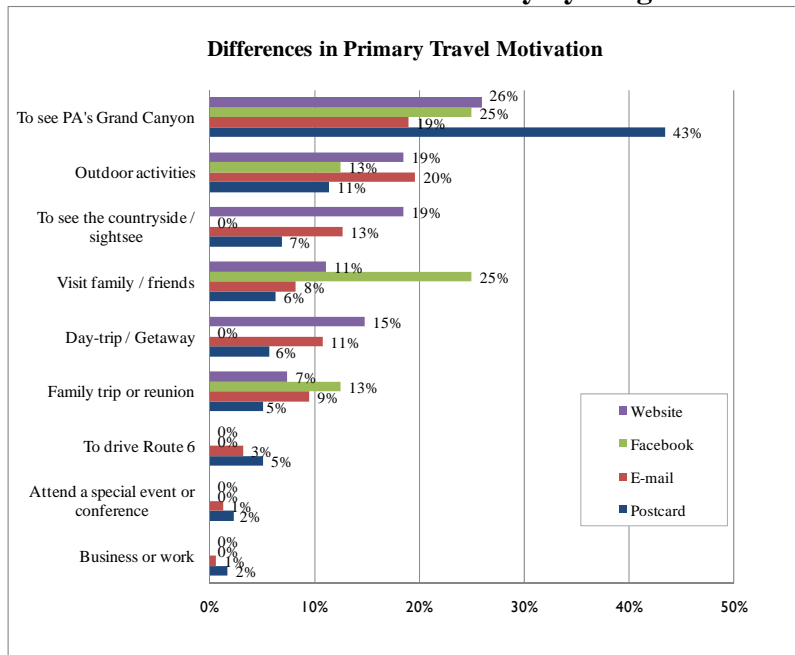


Table 8
Travel Motivation Variability by Origin



DISCUSSION

Results indicate that direct mail is still a viable and important method of survey distribution, particularly when combined with other access points. Direct mail does not necessarily have to be a full printed survey to get the desired effect of increased response rates; respondents to this study were mailed a postcard but took the survey online, greatly reducing costs for printing and postage. From a practical perspective, phone and mail surveys are much more expensive to implement than online approaches; primer mailings, reminder mailings, actual survey mailings, and return postage are all costs associated with sending a hard copy of a survey while online approaches require only one postcard mailing. A strong demand for methods utilizing mailing addresses still exists, due in part to the perception or reality that certain visitor populations may not be active online. In addition, visitors bureaus often have stronger databases of mailing addresses for visitors and potential visitors than e-mail addresses, and these resources should not be wasted.

CONCLUSION

Study findings illustrate that when using online surveys to gather visitor data, a multi-modal approach to driving survey traffic is recommended. Researchers should take advantage of as many consumer access points as possible to ensure that results are balanced. The more diverse the channels of consumer access, the more reliable and representative the results of online surveys can claim to be. In addition, through integrated marketing efforts consumers are likely to become aware of destinations at several points; where visitor surveys locate consumers is not necessarily where consumers “live” in relation to the destination.

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