

EF Tours Brochure Survey Analysis and Segmentation

Abstract

The purpose of this report is to analyze the results from the ET Brochure Survey, which was conducted in two waves over the past two months. An overall analysis of the results is provided, as well as a customer segmentation based on the answers given to questions pertaining to attitude towards the brochure. Additionally, a segmentation model based on customer demographic information has been generated, to predict likely segments for non-surveyed customers based on their similarities to respondents.

The survey consisted of 59 questions, and was sent to 13,000 group leaders. The first wave targeted 5,000 GLs:

- 500: repeat GL with at least TR status in 2014
- 500: Lapsed GL with last travel date 2012
- 500: new GL's with first travel year 2014
- 500: repeat GL's that travel every year 2013 and 2014
- 3000: no travel with insert date in 2012 and/or 2013 and had a highest sales opp status between TO and RC (at any point from 2012 until present)

The second wave targeted an additional 8,000 GLs, evenly split across 1-4 Score schools:

- 2012,2013 TR SalesOps
- 2014 TO,TS,RC,PA,AC,TR SalesOps
- 2015 TO,TS,RC SalesOps

Responses from 1,156 group leaders were collected. Of those submitted 968 answered all questions and took sufficient time to complete the survey as to comprehend and provide thoughtful answers.

Approach

EDA The survey questions were reviewed, and bucketed into 3 groups:

- Attitudinal (reflecting the GL's opinion/stance on planning a trip or the brochure): Responses 15-33,34-47*
- Behavioral (pertaining to how the GL actually plans a trip or interacts with EF): Responses 2-14,48-55
- Demographic (information about the GL or school): Responses 1, 57-59

Additional demographic information was pulled from Phoenix, including school score, school location, school enrollment, and travel history, and matched to the respondent.

A k-means cluster analysis was performed on the attitudinal responses for the

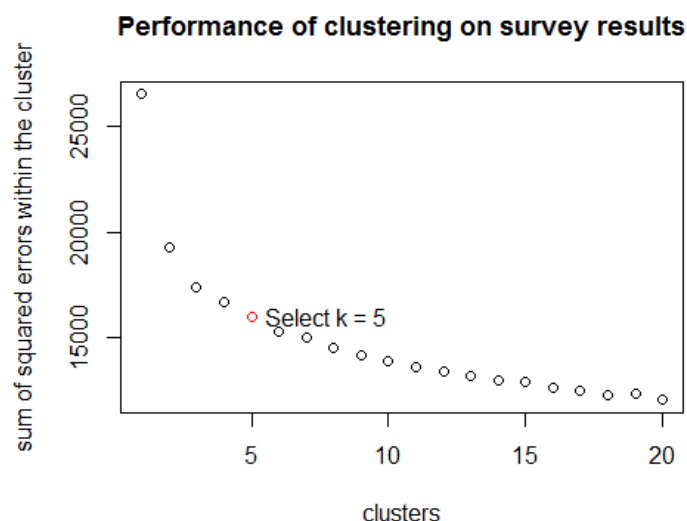


Figure 1

purposed of segmentation (Figure 1). The 2nd group of responses, 33-47, was not used in the cluster as they provided no additional information due to their homogeneity. Five clusters were identified and profiled. The cluster sizes were checked and validate to ensure a sufficient number of

observations for each. The smallest segment consists of 13% of respondents (segment 2), the largest 29% (segment 5). The distributions for each can be seen in Table 1.

Cluster	1	2	3	4	5
%	19%	13%	25%	14%	29%

Table 1

As a final step, a decision tree was generated to classify GLs into the above defined segments based on demographic information (Figure 2). Ideally this model can be used to draw inferences about brochure preferences across all prospects and in-house names.

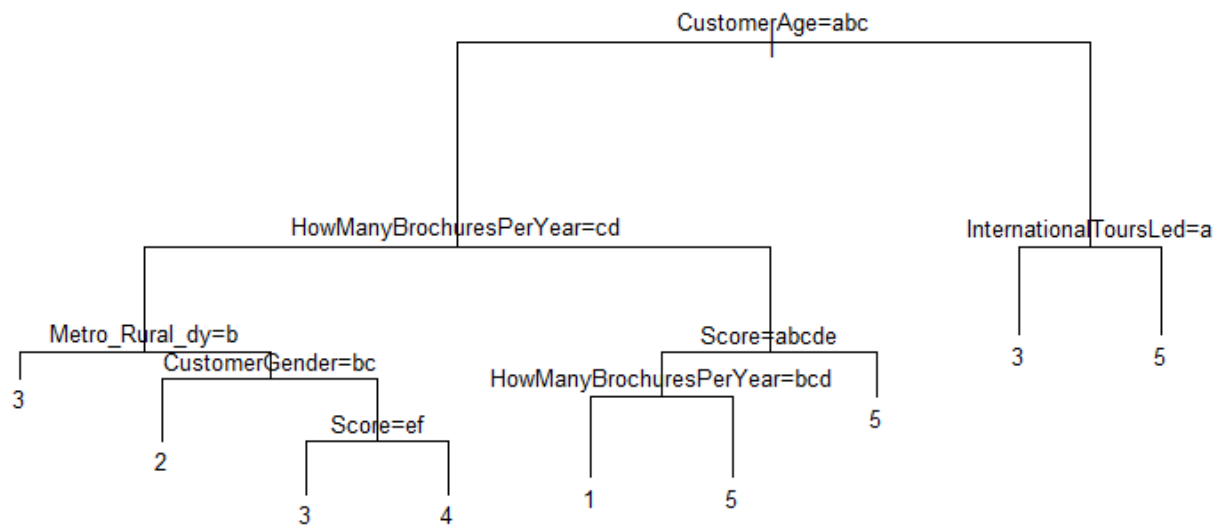


Figure 2

Findings

General. Overall, the majority of those surveyed were positive in their responses about the brochure. In Question 2, respondents were asked to judge the brochure's (in red) influence against the website, other resources, or their TC (Figure 3), for a series of tasks. The brochure plays a significant role in tasks early in the decision cycle for a GL; such as

deciding to travel and choosing tours. As a group leader gets further into the decision process, the brochure plays a less crucial role.



Figure 3

There was little variation in responses regarding the type of content in the brochure (Question 5). Generally all responses, both in the aggregate as well as by segment, indicated that the brochure contained enough as is (60%), or needed more (35%). The most notable exceptions were photographs of destinations – which skewed higher towards needing more (53%), and details about how going on tour works, with 30% indicating the brochure needed less.

Question 6 asked how familiar respondents were with ET non-core product offerings. Similar to the previous question, responses were consistent across all options, with ~50% of respondents indicating they had ‘heard of it; but don’t know a lot about it’. An additional 20% generally indicated they were very familiar with the product offering. The notable exception was WeShare, where 50% of respondents stated they had never heard of the product.

Overall, GL’s use brochures to choose a tour: 60% of respondents agree or strongly agree that the brochure is useful for choosing a tour. 58% of respondents agree or strongly agree that they use the brochure to keep track of tours they are interested in. 64% of respondents agree or strongly agree that they use the brochure to compare tour itineraries, compared with 37% that agree or strongly agree that they prefer using the web to find tours.

They also tend to share and/or leave them around for others: 50% agree or strongly agree that they share the brochure with students and parents.¹ 44% agree or strongly

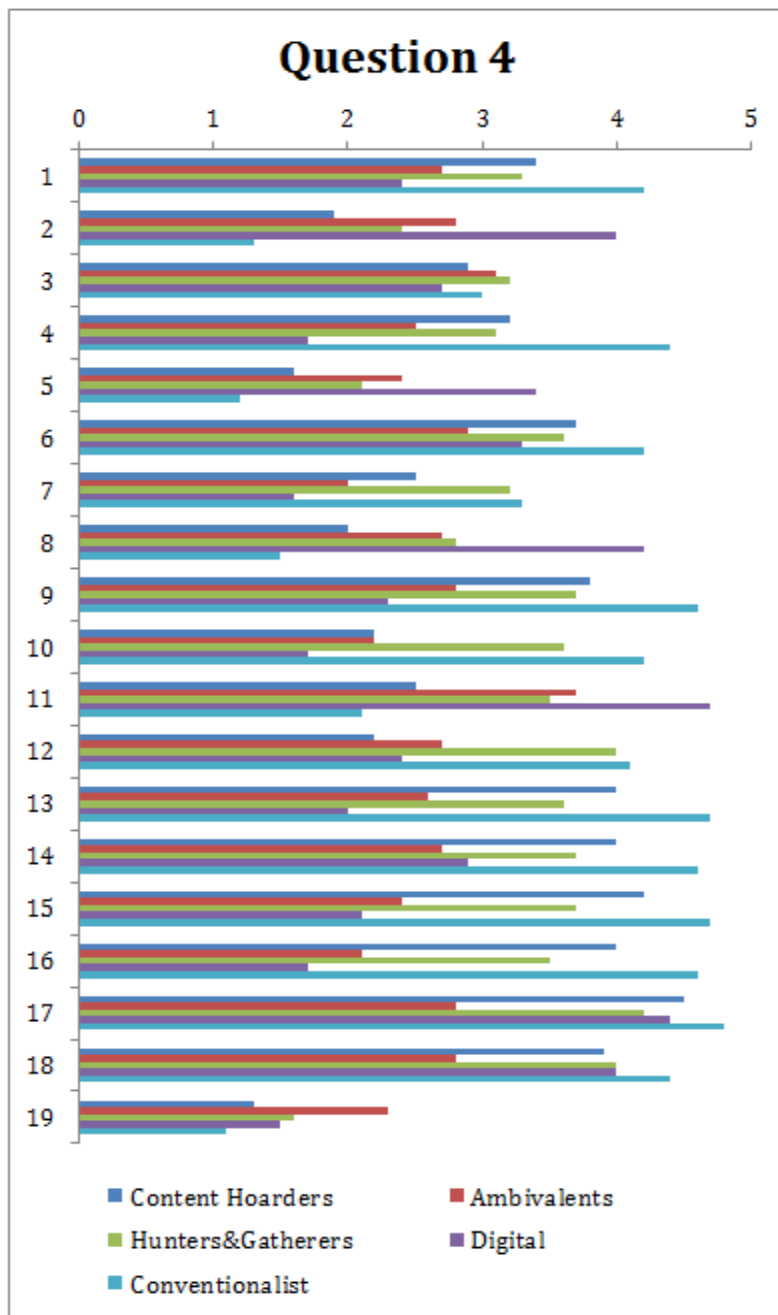


Figure 4

it's a good use of money and resources and it gets them excited about travel. Their tour

agree that they share the brochure with colleagues. 74% strongly disagree or disagree that they recycle or throw out the brochure when it arrives.

Segments. A summary of the five defined segments is provided below. Respondents were grouped based on similarities in their response to questions about their attitude towards the brochure. Responses to questions by segment can be seen in Figure 4 (full question text can be found in Appendix A):

Conventionalists (Cluster 5):

This group is the least likely to use the web. They not only prefer the printed brochure, they think

¹ Comments make it clear this response was skewed since some respondents were referring to the individual trip brochures.

selection is heavily influenced by the itinerary content.

“If you do away the brochure, I will probably stop traveling with EF. I always look at the brochure and compare places and prices to see where I want to take my students or participant”

“I love getting the brochures. I love to write in them, mark pages, and keep track of notes as I choose and plan my next tour. My students love to look through it and offer suggestions.”

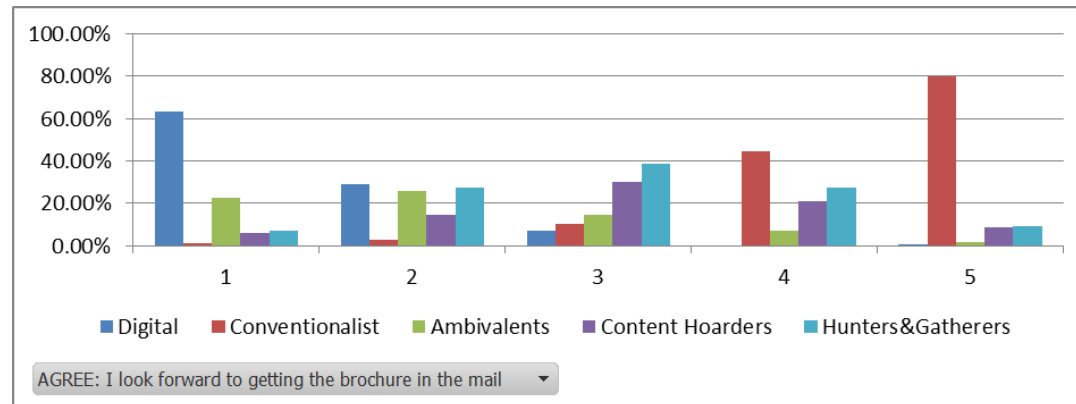


Figure 5

Digitals (Cluster 4): This group is the least likely to use the printed brochure. They not only prefer the web, they think the printed version is a waste of money and resources. They find more value searching for tours, pricing tours, and comparing tours online and view it as a one-stop shop.

“I truly don't really care for the brochure. I do everything online.”

“The brochure is fine, it is more of a reminder. I really like looking online better for the details”

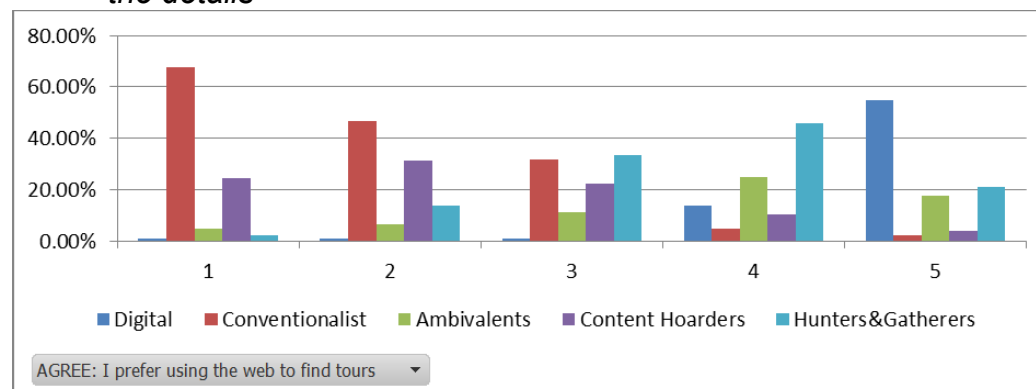


Figure 6

Hunters & Gatherers (Cluster 3): This group sees the value in both print and web. They are heavily influenced by content so as long as they're getting the info they need, they'll use either method. They are motivated to gather information to share with others in order to gauge interest level and opinions of colleagues, parents and students.

"I like the brochure and enjoy seeing the tours at once compared to online where I have to navigate the web. I do like both, however. I see the benefit of both."

"I use the brochure of the trip I am choose to advertise it during the our meetings with the parents. It is helpful and I really don't use as much the book with all the tours. I usually go online to look for a tour and then I call my tour consultant and he send me more info and prices."

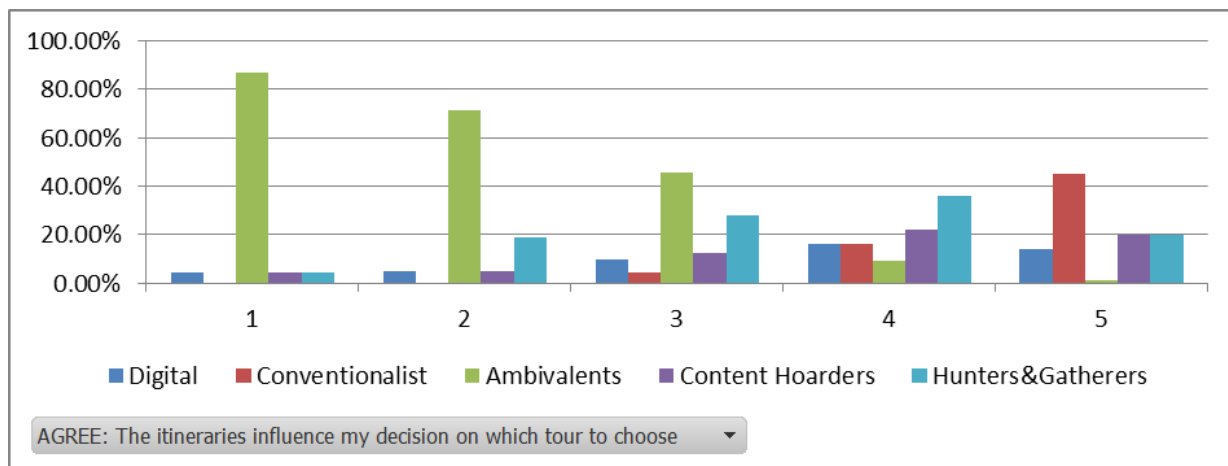


Figure 7

Ambivalents (Cluster 2): This group was the MOST middle of the road. They do not see great value in one medium over the other and truly have no preference. If they had to choose one as a tool, they have a slight preference for the web. They generally do not share the printed brochure with others.

"I flip through it, but don't use it for anything when planning"

"I look at it for excitement in between travel but do not use it as a valuable resource."

Private Investigators (Cluster 1): This group will use both print and web to gather information in order to identify which tour is right for them. They are heavily influenced

by content and likely further along in the process. Meaning, they are already sold on the idea of traveling with EF and would like to select a tour based on content—content they are unlikely to share with others because they are looking to make a decision. They have neither a preference for web or print.

“I enjoy the brochure to use as a supplement to the online materials”

“I do use it. I'd hate to see it go away. It "leads" me to the website when I've narrowed down the tours in which I'm interested”

“I only use the brochure to see if any new trips are being offered to Spain and then everything else I do is on-line.”

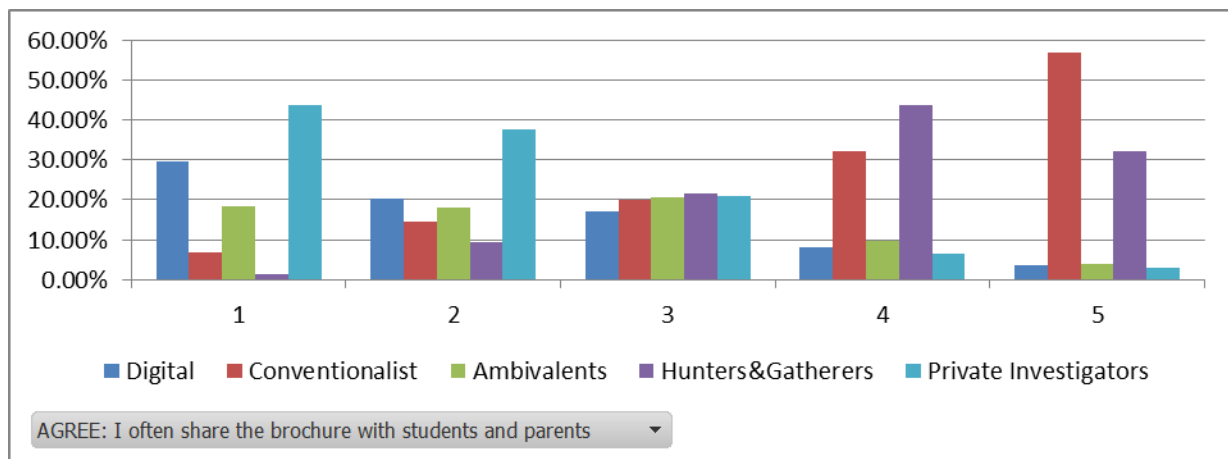


Figure 8

Free Text Response. Question 7 of the survey provided respondents with the ability to enter free form text to talk about their experience with the brochure. A text analysis was performed to identify the most common words used in the respondent’s feedback (Table 2).

- | | | | | |
|--------------|-----------|------------|------------|-------------|
| • appreciate | • find | • love | • pricing | • start |
| • done | • good | • mail | • school | • travel |
| • ef | • great | • new | • show | • traveled |
| • enjoy | • kids | • pictures | • since | • traveling |
| • experience | • looking | • prefer | • specific | • website |

Table 2

A second cluster analysis was then performed and cross-referenced with the previous defined clusters to observe similarities in how text responses identified the groups compared to the brochure survey questions (Figure 9). The extra grouping, labeled point 6, captures respondents who had provided a text response but either did not provide information to be included in the original clustering, or provided an incomplete response set. Segments

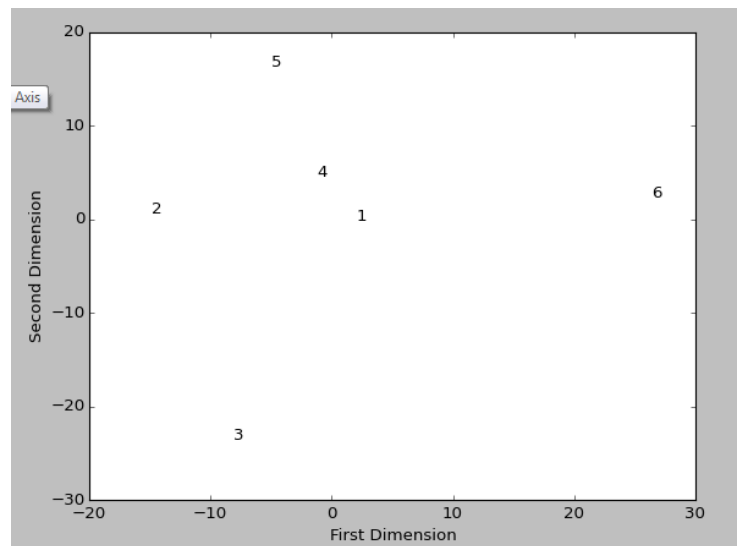


Figure 9

centered on the 0/0 axis points represent those who's text responses categorize it most similarly to the attitudinal question responses. A further exploration of those who diverge most severely from the mean can possibly reveal discrepancies between the two answers. In the short term, the top 5 words by original segments are provided in the table below:

Segment	Top Keywords
Conventionalists	appreciate, handy, itinerary, kids, looking
Digital	money, important, web, nice, people
Hunters and Gatherers	helpful, price, compare, service, recycle
Ambivalents	home, point, interested, personal, help
Private Investigators	info, something, teachers, parent, leaders

Table 3

Demographic. Questions related to customer or school demographic information, as well as related information retrieved from Phoenix, was cross tabulated by the defined segments to

Age: The majority of respondents were between the ages of 25 and 54, with 3 out of 4 fitting that demographic. The number of respondents in each of the included deciles was

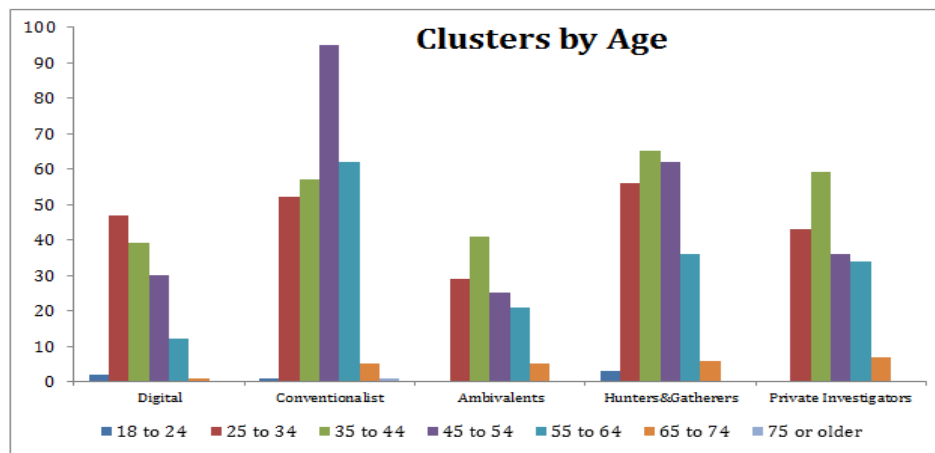


Figure 10

fairly even, with each ranging between 24-27% of total respondents. As expected, the Digital segment skewed younger, with 36% of that segment being in the 25-34 bracket. Conventionalist also performed as expected, exceeding the averages in the 45-54 bracket (35%) and 55 to 64 bracket (23%).

School Score: Respondents were skewed towards higher ranked schools, with nearly 40% being from level 4 schools, and 65% being from 4&5 level schools. The 2nd round of the survey was sent to try and achieve a more even

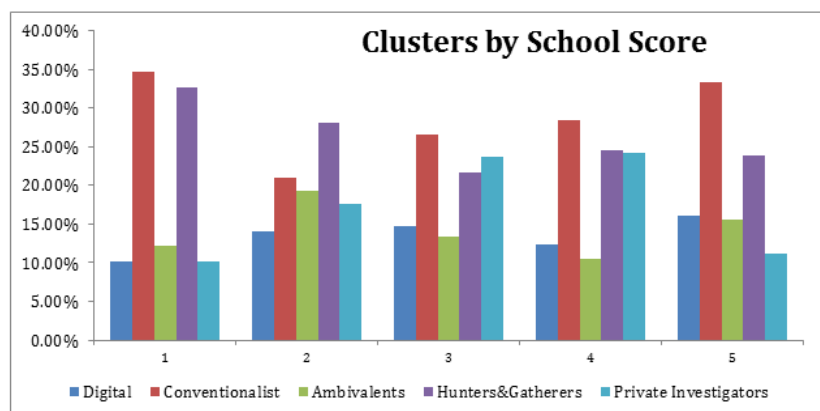


Figure 11

distribution among school

scores; final tallies were: Score 1-49 Respondents, Score 2-57, Score 3-203, Score 4-331, Score 5-231.

It is of interest to note the discrepancy in Private Investigator segments share between 3&4 schools, and level 5 schools. It doesn't appear that there is one particular segment that has cannibalized the segment, but rather they are dispersed evenly between Conventionalist and Digital segments.

International Tours Led: Respondents were also asked how many international tours they have led. The majority of respondents indicated they have led 1-4 tours (52%), with the

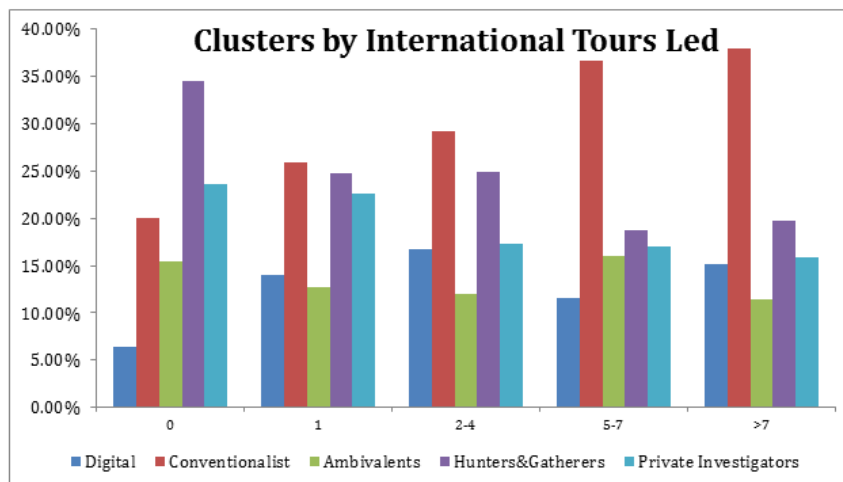


Figure 12

largest group being 2-4 tours (36%).

Group Leaders who have not led a tour - or only led a single tour - are strongly associated with the Hunters & Gatherers segment. These

dimensions align well as a target for the brochure, as this group is highly impressionable and more likely than others to use the brochure to decide to travel and choose a tour.

Appendix A

1. On average, how many times per year do you receive a travel brochure from EF Educational Tours?

☐ Less than once
☐ Once
☐ Twice
☐ More than twice
☐ I have never received the EF Educational Tours brochure
☐ I don't know

2. Indicate which resource you find MOST helpful when you're doing the following activities related to planning and going on an educational tour with your students:

	BROCHURE	TOUR CONSULTANT	EFTOURS.COM	N/A
Deciding to travel				
Choosing a tour				
Pricing tours				
Recruiting students/travelers				
Keeping track of dates and forms				
Learning about EF in general				

3. On a scale from 1 (did not influence) to 5 (a major influence), please rate how much the following items influenced your decision to travel with EF Educational Tours.

	1- did not influence	2	3	4	5- a major influence	N/A
Online research						
Conversations with colleagues						
Information I read on eftours.com						
Information I read in the brochure						
Conversations with my Tour Consultant						
My own prior travel experiences with EF						
Other						

4. On a scale from 1 (strongly disagree) to 5 (strongly agree) rate how much you agree or disagree with each of these statements about the EF Educational Tours brochure.

	1 - strongly disagree	2	3	4	5 - strongly agree
I am pleasantly surprised to get a brochure in the mail					
I think the brochure is a waste of money and paper—it's online					
I wish the brochure contained more information about the destinations I may travel to					
I look forward to getting the brochure in the mail					
I recycle or throw out the brochure when it arrives					
The brochure explains EF Educational Tours well					
I use brochures to compare tour companies					
I prefer the -brochure to the printed brochure					
The brochure makes me excited to plan a trip					
I often share the brochure with colleagues					
I prefer using the web to find tours					
I often share the brochure with students and parents					
I find the brochure useful in choosing a tour					
The brochure does a good job explaining different types of tours available to me					
I use the brochure to compare tour itineraries					
I use the brochure to keep track of tours I'm interested in					
The itineraries influence my decision on which tour to choose					
The itineraries show me the educational value of the tour					

The itineraries do not add value					
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5. Do you wish the ET Educational Tours brochure contained more or less of the following materials, or does it have enough as is:

	Needs less	Enough As Is	Needs more	I don't know
Photographs of where the tours go				
Itinerary details				
Maps of itineraries				
Information about the countries and cities visited (history, culture, language, etc.)				
Destinations available				
Tour prices				
Everything that's included in the price				
Tour reviews from other travelers				
Types of tours offered				
Educational benefits of tours				
On-tour safety				
Details about how leading a tour works				
Details about how going on tour works				
Information about the company				

6. Please indicate how familiar you are with the following EF tours products.

	I've never heard of it	I've heard of it but don't know a lot about it	I'm very familiar with it	I've used this product
AP Tours				
Custom Designed Tours				
Global Student Leaders Summits				
Language Immersion Tours				
North American Tours				
Service Learning Tours				
Subject-themed Tours weShare?				

7. What else would you like to tell us about your experience with the EF Educational Tours brochure?

8. How many times have you led an international tour with your students through EF? Please only include tours that you organized and planned as the Group Leader.

- 0
- 1
- 2-4
- 5-7
- More than 7

9. What is your age?

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 or older
- Prefer not to answer

10. What is your gender?

- Female
- Male
- Prefer not to answer