

MODERNISING VISITOR INFORMATION ACTION PLAN

Vision

To ensure the availability of world class, tailored information at every stage of the visitor journey, which will contribute to 5% growth, year on year, in the England tourism market by 2020.

Objectives

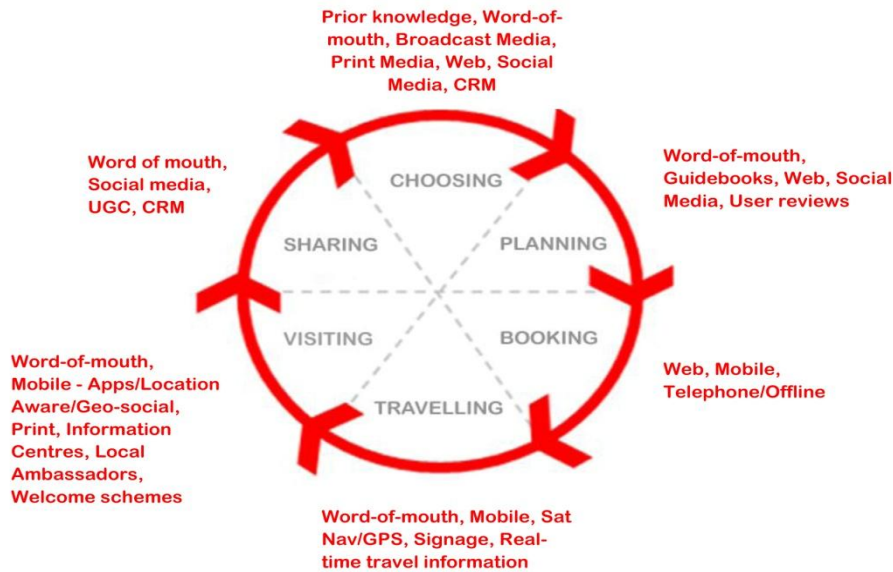
1. To share intelligence and best practice on visitor information provision across the industry, identifying gaps and opportunities.
2. To collaborate with partners in both the public and private sectors to optimise technological advances, extend the reach of visitor information services through effective distribution and drive increased cost-effectiveness.
3. To improve visitor satisfaction through the provision of world class customer service, leading to increased spending and the provision of compelling reasons for visitors to return and recommend others to visit.

What is Visitor Information?

Information is broadly defined as a collection of facts or knowledge from which decisions can be made. Visitor information needs to consider the range of interactions that take place throughout each stage of the 'visitor journey'. Whether through new technology or via face to face contact, visitor information provides an opportunity to influence decision making: the choice of destination; the length of stay; what to see, do and experience during a visit; and, whether to return or recommend to others.

The provision of visitor information is a vital part of the marketing process at each stage of the visitor journey. In addition to providing a valuable welcome and information service to the visitor 'in-destination', visitor information plays a key role in converting the marketing inspiration into the planning and booking stages and in effective customer relationship management (CRM).

The Visitor Journey – illustrating the range of interactions and methods of information provision at each stage:



Why take action on Visitor Information?

Deloitte’s 2008 report ‘The Economic Case for the Visitor Economy’ identifies gaps in information as one of the industry’s market failures:

“Information is imperfect, and there are significant failures where both consumers and businesses in the Visitor Economy suffer from information gaps and that potential visitors (both overseas and domestic) do not have the relevant information to use in their decisions. The provision of such information (or lack of it in free market conditions) is an example of market failure and manifests itself in the requirement for public provision”.

Research into the economic impact of Tourist Information Centres (TICs) (source: VisitBritain 2009) confirms that destinations benefit from hosting informed visitors who will stay longer and spend more. By working together to provide world class visitor information services that meet and frequently exceed the expectations of our visitors, we can provide a competitive advantage to England as a place to visit, make a measurable contribution to the quality of the visitor experience and make a significant contribution to the industry’s 5% annual growth target.

The provision of high quality visitor information plays a key role in enhancing the overall visitor experience by creating a positive image of a destination, providing a hospitable and friendly welcome and by creating a genuine sense of place. It presents an opportunity to inspire visitors to explore the tourism product that is distinctive to a certain locality, such as culture, heritage, local produce and, just as importantly, the people. This can lead to wider improvements in the performance of the visitor economy and generate local benefits that directly support the principles of ‘wise growth’ (see Wise Growth Action Plan). Similarly, the provision of consistent information about public transport and sustainable travel options will help achieve wider goals of lower carbon emissions from travel to and around destinations.

The Context

The ways that visitors access information has changed dramatically in recent years. Over the next ten years, developments in new technology and changes in consumer behaviour will continue to shape the future of visitor information services in England and will require a radical step-change in information delivery across the industry.

In the UK, 76% of the population use the internet (source: IMRG April 2010). It is regarded as the main source of information for travel planning and the key medium at the booking stage but offline booking alternatives remain important.

Research shows that 24% of UK mobile phone users (estimated variously at between 7.2m and 17.4m) have browsed the internet with their handsets, with an annual increase of 33% (source: telecoms.com 2009). Globally, smart phone usage grew 193% from February 2009 to February 2010.

The growth of social media has led to a fundamental shift in the way we communicate. Estimates say that by 2012 nearly half the UK population will be using social media; it is vital that the industry responds to this.

TICs across England deal with over 24 million visits a year; approximately one third of these are estimated to be staying visits, the rest are day visits and residents. Approximately 20% of overseas holiday visitors had used a TIC during their trip to Britain (source: International Passenger Survey 2008) – 11% among all visitors. TIC users have a broad profile but, in general, the age profile of users is skewed to older age groups. There are also substantial variations in user profile depending on destination type. Research has indicated that approximately 16% of Tourist Information Centres account for about 60% of activity. These figures relate to visits and enquiries, in relation to bookings the figure was often higher. Research in some regions and from British Destinations indicates that bookings have been in decline but visitor numbers show greater stability.

Challenges and Opportunities

- Well informed visitors will stay longer in destinations, potentially move on to other English destinations and, most importantly, will want to return. The tourism industry must ensure that information is modernised, integrated nationally and maintains pace with technological advances.
- Methods of providing visitor information must evolve over time in response to advances in technology and changes in consumer behaviour. To enable this, information on market and technological trends, on visitor behaviour and on best practice in information provision (enabling Destination Management Organisations to learn from each other and from other sectors) must be more widely available to enable informed decision making at every level.
- There will be a rapid increase in the use of technology to access visitor information – particularly via mobile devices and applications including map based search functions using Global Positioning Systems (GPS), information accessible through cameras (through location recognition and augmented reality), QR Codes ('barcodes' which can be read by some smart phones and provide more information or weblinks), spatially referenced User Generated Content (UGC) and location based services.

- Social media will play an increasingly influential role in the ways that people gather information about a destination in advance and, through the use of smart phones, during their visit.
- UGC will grow exponentially and become more sophisticated, particularly in terms of video on YouTube and consumers will increasingly use preferred sources to inform purchasing and visiting choices. It will be the type of information used at certain stages of holiday planning by the majority of visitors in selecting places to visit, stay, eat, drink and shop. Review sites are believed to be one of the most useful and trusted sources of UGC, with 35million visitors a month to Trip Advisor alone. It will also provide valuable feedback to destination professionals and businesses about areas for product development and improvement.
- Consumers will continue to need access to accurate information on places. This information will come from a variety of trusted sources and will support destination marketing activity. For SMEs, getting their data out there remains a challenge. Information about tourism businesses should be collected (or provided) once for distribution through multiple channels, public and private, at every level, from local to international, and will increasingly be the responsibility of the private sector to collect and maintain.
- Dedicated TICs with a high footfall and / or a clear service will continue to play a key role in principle tourism destinations through professional staff who are skilled in customer care and have a wealth of product knowledge. However, in some cases, a TIC's inability to make recommendations and the poor location of some centres can create a barrier. Limited opening hours are also an issue in an era when consumers expect to be able to access information 24hours a day, 7 days a week.
- Face to face contact with some 24 million 'customers' each year should be a crucial element in understanding our visitors. TICs provide an opportunity to learn more about their profile, visitor patterns and booking habits and to influence them to make repeat visits. TICs can also play a key role in customer data collection and e-marketing.

The Action Plan

The aim of this Action Plan is to shift visitor information provision towards collaboration and on taking information to the visitor, rather than expecting the visitor to come to the information. There is an opportunity for a wider range of 'contact points', virtual and physical, to emerge which should be equipped with the tools and product knowledge required to service visitor needs effectively.

Businesses such as visitor attractions, hotels and accommodation, retailers, restaurants, travel agents, transport operators, car rental companies, public houses, village shops, petrol stations, motorway service stations and post offices have an opportunity to increase business and customer satisfaction by providing visitor information as part of their service.

Objective 1: To share intelligence and best practice on visitor information provision across the industry, identifying gaps and opportunities.

ACTION	LEAD PARTNERS (where appropriate)	SIGNED UP PARTNERS	OUTCOME OR SUCCESS MEASURE
<p>i. Establish a Visitor Information Group to facilitate and identify gaps and opportunities at different stages of the customer journey:</p> <ul style="list-style-type: none"> • Collate, analyse and disseminate market intelligence about customer requirements for different types of destinations. • Gain and maintain industry intelligence and best practice. • Seek out and share lessons via case studies of alternative models in the provision of visitor information, including funding models, outreach services and commercial opportunities. • Analyse the evolving patterns and methods of provision, identifying strategic gaps and potential solutions. Monitor the process of change and its impact on service provision. 	<p>VisitEngland/ Visitor Information Group</p>	<p>Destination Management Organisations (DMOs) Visit Kent Marketing Cheshire Local Government Association (LGA) Museums Libraries and Archives (MLA) Private/Commercial Sector</p>	<p>Joining up with providers to deliver a seamless flow of information to visitors. More effective marketing, increased conversion, visits and visitor spend.</p> <p>Creation of a resource library hosted on the existing on-line platform which is organic and incorporates new thinking when and where it happens.</p> <p>To assist the existing network of partners to sustain, remodel and develop their services.</p> <p>Opportunities identified for the private sector to deliver visitor information services.</p>
<p>ii. Develop tools and methodologies to facilitate consistent measurement for all types of visitor information provision at the local level.</p>	<p>Visitor Information Group</p>	<p>DMOs Local Authorities MLA Private/Commercial Sector</p>	<p>A suite of tools and performance metrics, consisting of:</p> <ul style="list-style-type: none"> • A national framework for data collection and consistent analysis of KPIs • Customer survey methodology • Economic impact methodology • Visitor Satisfaction measurement • Wider Stakeholder value measures.
<p>iii. To monitor consumer trends and patterns in use of information technology supply to consumers and analyse the impacts, implications and opportunities for tourism, information providers and destinations.</p>	<p>VisitEngland</p>	<p>Information Providers Destination Management Organisations</p>	

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iv. Provide guidance to ensure 'wise growth' messages are communicated to visitors creating positive consumer behaviour while travelling to and around destinations. Increase the provision of consistent information about sustainable/public transport options by businesses and other providers.	Visitor Information Group Group	Local Authorities DMOs Wise Growth Advisory Group TICs	Greater number of businesses embracing 'wise growth'. Add KPI to measure growth (Objective 1: ii)
v. Encourage businesses to provide quality accessible information for distribution through VICs and other channels.	VisitEngland	Tourism for All (TfA)	Accessibility information provided for greater percentage of products. Increased satisfaction levels for disabled customers.

Objective 2: To collaborate with partners in both the public and private sectors to optimise technological advances, extend the reach of visitor information services through effective distribution and drive increased cost-effectiveness.

ACTION	LEAD PARTNERS (where appropriate)	SIGNED UP PARTNERS	OUTCOME OR SUCCESS MEASURE
<p>i. Develop partnerships with national players, in both the public and private sector, to extend the virtual service network for acquisition of content and for information distribution through third party channels, in England and abroad.</p> <p>Facilitate workshops with key destination partners to identify innovative platforms for the delivery of visitor information that are relevant, targeted and appropriate.</p> <p>Work jointly with the future providers of mobile web services and applications to maximise the quality</p>	VisitEngland	<p>Large retail and hospitality chains</p> <p>Travel agents</p> <p>Google</p> <p>Trip Advisor</p> <p>Culture24</p> <p>MLA</p> <p>DMOs</p>	<p>Increased exposure of product through a range of digital channels.</p> <p>Provide appropriate tools such as apps to inform and inspire and QR codes to deliver information where there is no viable source.</p> <p>Support the marketing framework for principle destinations and thematic products.</p>

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and variety of information and offers relating to England as a destination.			
ii. Extend the physical service network, brokering new national partnerships including franchise agreements with key public/private players.		Gateway TICs Major attractions MLA Accommodation Providers Retailers (inc Waterstone's) British Beer and Pub Association (BBPA) Print/Leaflet distributors	National negotiations can be used to enable and facilitate partnerships (or distribution agreements) at destination level
iii. Exploit opportunities for the provision of visitor information through guiding services and a network of Ambassadors and Greeters.		Visit Kent Guild of Registered Tour Guides Volunteering England Greeter and Ambassador programme	Enhanced visitor satisfaction.
iv. Develop a network of England advocates within visitor information centres and related services to act as 'brand ambassadors' for their destination and England.	VisitEngland	DMOs Local Authorities	Utilise advocates to maximise PR and other means of communication across key sectors.
v. Implement closer working arrangements with front line TICs and information providers, harnessing opportunities for greater continuity of brand and message in-destination.		Airport Operators Association Network Rail DMOs	Delivery of brand promise to improve the 'Welcome' experience that meets/exceeds visitor expectations.

Objective 3: To improve visitor satisfaction through the provision of world class customer services, leading to increased spending and the provision of compelling reasons for visitors to return and recommend others to visit.

ACTION	LEAD PARTNERS (where appropriate)	SIGNED UP PARTNERS	OUTCOME OR SUCCESS MEASURE
<p>i. Develop a partner support programme in order to improve the effectiveness and efficiency of the visitor information delivery network:</p> <ul style="list-style-type: none"> • Review the Enjoy England Official Partner programme to up-date requirements and ensure it is fit for purpose. • Review the national mystery shopper programme and re-position with a more holistic approach to measuring quality of service and customer satisfaction. • Establish a new approach for TICs regarding the recommendation of facilities and services that will meet visitors' requirements, using user generated content where appropriate. 		<p>Visitor Information Sub-Group</p>	<p>Identify common objectives and actions aimed at achieving excellence.</p> <p>Review and up-date the current guidelines and partner benefits.</p> <p>Match against new KPIs to maximise statistical recording and CRM opportunities to enable market intelligence.</p> <p>Improved visitor satisfaction.</p>
<p>ii. Analyse current customer service training delivery, including product knowledge, new technology, commerciality, sense of place and language skills and signpost/encourage providers to integrate within their objectives.</p>		<p>Marketing Cheshire Tourism South East People1st Go skills</p>	<p>Identify training products and services that will best meet the needs of information staff.</p> <p>Identify the skill sets required.</p>