

## RESEARCH AND INTELLIGENCE ACTION PLAN

### Vision

Maximise the use of tourism market intelligence and performance data to inform the investment and planning decisions of businesses and public sector partners, which will contribute to 5 % growth, year on year, in the England tourism market by 2020.

### Objectives

1. Establish an industry partnership to lead the development and dissemination of market intelligence and performance data for England's visitor economy.
2. Develop and deliver a programme which captures and retains the best of current practice across England, and adapts to meet the needs of destinations and other sub-national partnerships.
3. Improve the understanding and use of market intelligence and performance measures through improved communication and interpretation.
4. Develop and deliver a programme of sector performance indicators, consumer focused intelligence (including a new measure of visitor satisfaction), together with a programme of research to deliver consumer and business insights and trends.

### Why take action on Research and Intelligence?

Good quality and timely market intelligence is vital for the tourism industry; to inform decision-making and investment choices, provide insight for the small and medium sized businesses which make up a large part of the industry, and to measure the economic and social impact on the wider economy.

Intelligence tells the industry about visitors - what they do, what they think, where they go, how much they spend. It also provides a clearer picture about the visitor economy – what businesses there are and where, how well they are doing, who's growing and who's facing challenges. Intelligence helps the industry understand what's going on, helps it make better decisions, and helps it understand the product - England.

The impending changes to tourism structures with emphasis on leadership and facilitation at national level and delivery and management at the local level, provides the context for future delivery and coordination of research and intelligence. The resulting realignment of roles and responsibilities presents the industry with challenges and opportunities, including reassessing needs, investment, and delivery.

### Challenges and Opportunities

- Strong leadership and coordination will be required to maximise investment and the value of tourism intelligence. The visitor economy is characterised by its disparate nature, comprising small and large businesses across a range of sectors as well as a large number of public and private sector partners. This presents particular challenges for collecting and presenting

meaningful intelligence. Following on from the work of the English Tourism Intelligence Partnership (ETIP) and that of regional tourism delivery bodies, leadership is required to maximise partners' collective involvement in research investment and delivery.

- The need for wise use of scarce resources is a key issue for all tourism partners. Pressure on budgets at national and local levels, and for businesses in controlling costs, means that investment in tourism research must be well planned and meet user needs. Opportunities exist to forge new partnerships – across the public and private sector, at local and national level - to fund and deliver meaningful intelligence for the industry and explore means of delivering the full value of existing research. There is also a need to identify additional streams of revenue from research and intelligence, in order to be able to maintain and develop the work carried out – this is particularly critical for the ONS Tourism Intelligence Unit, which cannot operate beyond the current financial year without identifying new sources of funding.
- Concerns about the quality of tourism research and intelligence are well understood - the *Review of Tourism Intelligence, 2004, DCMS and ONS (Allnutt Review)* provided the most recent official assessment of fitness for purpose. Partners for England recognised and took on this challenge, establishing ETIP and the Tourism Intelligence Unit (TIU), a dedicated tourism unit within the Office for National Statistics, as a three year programme in 2008. Good progress has been made by ETIP and its delivery partners in improving core tourism intelligence inputs and remedying identified gaps and problems. This momentum needs to be maintained, focusing on meeting future data needs while ensuring that existing best practice and key data and intelligence are captured for ongoing usage by partners.
- With new management and delivery structures established for the industry, an on-going challenge is to ensure continuity in data trends where these are required by businesses and partners across the visitor economy, as well as improving the comparability of data and intelligence. In particular, there is a need to ensure that the needs of destinations and other sub-national partnerships are taken into account, in terms of both data collection and dissemination.
- Relevant research and intelligence is equally important for businesses and public sector stakeholders. An ongoing challenge is to ensure that the large amount of data and intelligence that is available is communicated, understood, and applied to meet the needs of all stakeholders.
- It is essential that a credible programme of key performance measures for different sectors of the tourism industry are in place and are fully utilised, recognised and trusted.

## **The Action Plan**

Working closely with industry partners, VisitEngland and VisitBritain have established a suite of national surveys and performance measures, including key tourism volume and value data (IPS, UKTS, England day visitor survey, Deloitte's economic impact studies), market trends and analysis, consumer understanding, accommodation and attractions sector performance measures. The improvements made to the robustness and usefulness of key national surveys are recognised. However, in light of the emerging DCMS Tourism Policy and evolved sub-national tourism structures, it is prudent to review the national programme to ensure key performance measures remain relevant.

A summary of the current national programme is included for review in [Appendix 1](#).

**Objective 1: Establish an industry partnership to lead the development and dissemination of market intelligence and performance data for England’s visitor economy.**

<b>ACTION</b>	<b>LEAD PARTNERS (where appropriate)</b>	<b>PARTNER SIGN UP</b>	<b>OUTCOME OR SUCCESS MEASURE</b>
i. Establish an industry partnership to lead the development and delivery of the national research and intelligence programme: <ul style="list-style-type: none"> <li>• New National Tourism Intelligence Stakeholder Group (leadership/ ownership of national plan).</li> <li>• New associated groups to support the delivery of the programme where appropriate.</li> <li>• Agree roles of key partners.</li> </ul>	VisitEngland, Destination Management Organisations (DMOs), Office for National Statistics (ONS)	VisitEngland, DCMS, ONS, Local Enterprise Partnerships (LEPs), DMOs, Local Authorities, higher education sector, British Destinations (BD), cultural agencies, sector skills agencies	<ul style="list-style-type: none"> <li>• Partnership formed.</li> <li>• Stakeholder satisfaction.</li> <li>• Plan objectives delivered to agreed schedule.</li> </ul>
ii. Investigate appropriate means of realising the full value of intelligence and data, and explore new means of funding and supporting key elements of the research & intelligence programme.	VisitEngland, ONS	National Tourism Intelligence Stakeholder Group, VisitEngland, ONS, DMOs, Local Authorities, BD, cultural agencies	<ul style="list-style-type: none"> <li>• New funding mechanisms which sustain the target level of research and intelligence activity.</li> </ul>

**Objective 2: Develop and deliver a programme which captures and retains the best of current practice across England, and adapts to meet the needs of destinations and other sub-national partnerships.**

<b>ACTION</b>	<b>LEAD PARTNERS (where appropriate)</b>	<b>PARTNER SIGN UP</b>	<b>OUTCOME OR SUCCESS MEASURE</b>
i. Ensure that the body of current and legacy research and intelligence from regional partners is retained for the benefit of the tourism industry.	VisitEngland, Regional Development Agencies (RDAs), Regional Tourist Boards (RTBs)	VisitEngland; Department for Business Innovation and Skills (BIS), sub-national bodies	<ul style="list-style-type: none"> <li>• Key data remains accessible beyond the lifetimes of the Regional Development Agencies.</li> <li>• Stakeholder satisfaction.</li> </ul>
ii. Identify and disseminate best practice in tourism research and intelligence, including exploration of new methodologies and technologies.	National Tourism Intelligence Stakeholder Group - VisitEngland, tourism destinations	VisitEngland, ONS, DMOs, Local Authorities, higher education sector, BD, cultural agencies	<ul style="list-style-type: none"> <li>• Best practice identified and published</li> </ul>

<b>ACTION</b>	<b>LEAD PARTNERS (where appropriate)</b>	<b>PARTNER SIGN UP</b>	<b>OUTCOME OR SUCCESS MEASURE</b>
iii. Build on the legacy of the improvements made to tourism research and intelligence through the work of ETIP/TIU: <ul style="list-style-type: none"> <li>• Identify the priority programmes and work areas.</li> <li>• Work with DCMS and ONS to explore funding options beyond April 2012.</li> </ul>	National Tourism Intelligence Stakeholder Group - ONS, DCMS, VisitEngland	ONS, DCMS, VisitEngland	<ul style="list-style-type: none"> <li>• Agreement reached on continuation of Tourism Intelligence Unit (TIU).</li> <li>• Delivery of identified research outputs.</li> </ul>
iv. Conduct an industry user needs survey to understand partner requirements, particularly destinations and other sub-national partners.	VisitEngland, BD, DMOs	VisitEngland	<ul style="list-style-type: none"> <li>• Survey delivered to schedule.</li> </ul>
v. Develop and deliver a national tourism intelligence and research programme, taking into account user needs as identified through the survey and other consultation exercises.	National Tourism Intelligence Stakeholder Group - VisitEngland, VisitBritain	VisitEngland, VisitBritain, Local Authorities, Destination Management Organisations, BD, ONS, DCMS	<ul style="list-style-type: none"> <li>• Stakeholder satisfaction.</li> </ul>
vi. Improve the availability, quality and consistency of sub-national (regional, county, destination, Local Enterprise Partnership) research, intelligence and statistics by: <ul style="list-style-type: none"> <li>• Providing leadership and co-ordination across individuals and organisations engaged in sub-national data collection</li> <li>• Developing and promoting best practice in methodologies for key surveys (including further development of TIU guides).</li> <li>• Exploring the degree to which existing surveys / data sources can deliver data at sub-national level.</li> <li>• Promoting a modular approach to allow sub-national partners to “buy in” to national surveys in a cost effective way.</li> </ul>	National Tourism Intelligence Stakeholder Group, BD, ONS, VisitEngland, Sub-national bodies	BD, sub-national bodies, ONS, VisitEngland	<ul style="list-style-type: none"> <li>• Formalised programme of sub-national reporting of national surveys.</li> <li>• Awareness of ratecard of “buy in” modules.</li> <li>• Awareness of best practice guidelines and options of co-ordinated activity.</li> </ul>
vii. Investigate opportunities to work more closely with universities to take advantage of both past publications and future work programmes.	National Tourism Intelligence Stakeholder Group, ONS, higher education sector, VisitEngland	ONS, higher education sector, VisitEngland	<ul style="list-style-type: none"> <li>• Greater awareness of academic sources.</li> <li>• Influence on future academic work programmes.</li> </ul>

### Objective 3: Improve the understanding and use of market intelligence and performance measures through improved communication and interpretation.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
i. Integrate a programme of interpretative materials into the national tourism research and intelligence programme, based on identified user needs, and taking advantage of web-based dissemination tools.	National Tourism Intelligence Stakeholder Group - VisitEngland, BD, DMOs	VisitEngland, BD, DMOs	<ul style="list-style-type: none"> <li>• Utilisation of interpretative materials.</li> <li>• Stakeholder satisfaction.</li> </ul>
ii. Investigate the potential to develop and deliver an industry research and intelligence capacity/capability to improve usage and understanding of the data available.	National Tourism Intelligence Stakeholder Group - VisitEngland, BD, DMOs, Tourism Management Institute (TMI), Tourism Society (TS)	TMI, TS, Local Authorities, DMOs	<ul style="list-style-type: none"> <li>• Utilisation of/ satisfaction with programme should it be established.</li> </ul>
iii. Engage and partner with business in order to better understand business needs, and gain commitment to participate in key performance studies and/or share non-sensitive intelligence.	National Tourism Intelligence Stakeholder Group - VisitEngland, Tourism Alliance (TA), DMOs	VisitEngland, TA, DMOs	<ul style="list-style-type: none"> <li>• Levels of business participation in key performance measures/surveys.</li> </ul>
iv. Improve communication of sub-national tourism research and intelligence: <ul style="list-style-type: none"> <li>• Explore options for data sharing via online platforms (data warehousing).</li> <li>• Better communication of national sources at sub-national level.</li> </ul>	National Tourism Intelligence Stakeholder Group, VisitEngland, BD, ONS	VisitEngland, BD, ONS, sub-national bodies	<ul style="list-style-type: none"> <li>• Publication and awareness of sub-national analysis of national data sources.</li> <li>• Development of data warehouse or alternative mechanism.</li> </ul>
v. Prepare a communications action plan, further developing VisitEngland website as key communication source and portal for the sector, and developing a programme of newsletters, webinars, forums, press releases.	National Tourism Intelligence Stakeholder Group – VisitEngland, ONS, DMOs, Local Authorities, higher education sector, BD, cultural agencies.	VisitEngland, DMOs, ONS	<ul style="list-style-type: none"> <li>• Stakeholder satisfaction.</li> <li>• Increased usage of website/ communication mechanisms.</li> </ul>

**Objective 4: Develop and deliver a programme of key national tourism sector performance indicators, consumer focused intelligence (including a new measure of visitor satisfaction), together with a programme of research to deliver consumer and business insights and trends.**

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
i. Develop and agree a programme of national KPI's which are credible, timely and cost effective. This is likely to include: <ul style="list-style-type: none"> <li>• Volume and value of overnight domestic tourism, day visits and inbound tourism.</li> <li>• Employment and GVA measures.</li> <li>• Sector performance (accommodation, attractions and sector performance).</li> <li>• Evaluation of marketing and other organisational activity.</li> <li>• Sustainability indicators.</li> </ul>	National Tourism Intelligence Stakeholder Group - VisitEngland, VisitBritain, TA, DMOs, Local Authorities, DCMS, ONS, BD, sector skills agencies	VisitEngland, VisitBritain, ONS, Local Authorities, DMOs, LEPs	<ul style="list-style-type: none"> <li>• Timely and comparable economic and industry performance measures delivered.</li> <li>• Stakeholder satisfaction.</li> </ul>
ii. Develop a national measure of visitor satisfaction (including brand engagement and perceptions).	VisitEngland	VisitEngland	<ul style="list-style-type: none"> <li>• Pilot in place, updated methodology from early Year 1.</li> </ul>
iii. Develop and deliver a programme of primary and secondary market research and intelligence to inform decision making and to address key knowledge gaps, including: <ul style="list-style-type: none"> <li>• Market Trends.</li> <li>• Understanding and interpreting consumer behaviour.</li> <li>• Tourism futures – investigating forecasting and scenario planning.</li> <li>• Informing work across the framework areas and monitoring action plan outcomes.</li> </ul>	National Tourism Intelligence Stakeholder Group - VisitEngland, Tourism Alliance, tourism destinations, ONS, BD, sector skills agencies	VisitEngland, DMOs, ONS	<ul style="list-style-type: none"> <li>• Stakeholder satisfaction.</li> <li>• Utilisation of intelligence.</li> </ul>

<b>ACTION</b>	<b>LEAD PARTNERS (where appropriate)</b>	<b>PARTNER SIGN UP</b>	<b>OUTCOME OR SUCCESS MEASURE</b>
iv. Develop a partnership with industry and destinations to generate a comprehensive set of key tourism input data, both 'supply side' (e.g. accommodation stock) and 'demand side' (e.g. occupancy, yield, and visitor numbers).	National Tourism Intelligence Stakeholder Group - VisitEngland, Tourism Alliance, tourism destinations, ONS, BD, sector skills agencies	VisitEngland, DMOs, ONS, TA	<ul style="list-style-type: none"> <li>• Stakeholder satisfaction.</li> <li>• Utilisation of intelligence.</li> </ul>
v. Develop a programme to address key gaps in knowledge for areas outside core tourism but of relevance to the industry, potentially including: <ul style="list-style-type: none"> <li>• Impact / value of sectors excluded from standard KPI measures (e.g. cruise tourism).</li> <li>• Social and other non-economic measures of tourism impact (e.g. resident impacts / attitudes) broader economic context.</li> <li>• Skills issues.</li> <li>• Leisure trends.</li> <li>• Transport.</li> </ul>	National Tourism Intelligence Stakeholder Group - VisitEngland, Tourism Alliance, DMOs, ONS, BD, sector skills agencies	VisitEngland, DMOs, ONS, consultants, cultural agencies, Universities, other public sector bodies	

## **APPENDIX 1 – Current National Intelligence Programme Delivered by VisitEngland**

Each year, VisitEngland conducts a series of continuous surveys measuring both performance and business and consumer attitudes, alongside a programme of ad hoc research based on the needs of the market and the organisation (in 2010, for example, this included research into the “staycation” phenomenon; research among consumers and industry into requirements for the QAS; research into consumer attitudes to sustainability and more).

The following list summarises the continuous surveys that have been conducted in 2010 and are planned for 2011; an ad hoc research programme for 2011 – 2012 and beyond will be developed following review of all action plans across the strategic framework.

### **Volume and Value Measures**

#### **UK Tourism Survey (from 2011 – GB Tourism Survey)**

The UKTS measures overnight domestic tourism, providing data about volume (number of trips and number of bednights) and value (spend per night and per trip). This information is available in total and for a range of other variables, including trip characteristics (e.g. purpose, accommodation, transport) and demographics (e.g. age, social grade, presence of children).

Improvements since 2008 include a greater depth of regional analysis, production of county-level analysis and increased interpretation for monthly and annual results. Further reporting improvements are planned for 2011, as well as the collection (for the first time since 2003) of data about activities undertaken on domestic trips.

This survey is a statutory requirement – the data collected is submitted to Eurostat.

#### **GB Day Visits Survey**

Information about the volume and value of Day Visits was identified early on by ETIP as a major information gap. A new survey to measure tourism day visit activity across the whole of Great Britain is being launched in January 2011, with the first annual data set available in early 2012.

The survey format (online interviewing) is flexible enough to allow sample sizes to be increased or decreased in subsequent years as required (or indeed for years to be skipped if annual reporting is not felt to be necessary); the survey also offers an options for regions or sub-regions to “buy-in” to additional interviews within their nominated catchment area.

It is expected that day visits information will become a statutory requirement within the next two to three years – this is currently under discussion by Eurostat.

#### ***International Passenger Survey***

*Data about the volume and value of inbound tourism is provided through the International Passenger Survey, run by the ONS, with additional analysis (and sponsorship of additional questions e.g. activities) provided by VisitBritain*

### **Business Performance Indicators**

#### **England Occupancy Survey (EOS)**

EOS is a measure of performance within the serviced accommodation sector, recording levels of bedroom and bedspace occupancy. Results are presented in total and by establishment type and size, tariff band, destination type and for weekend vs. weekday periods.

The survey was refreshed in 2009, and since then occupancy data for England includes additional data for the hotel sector supplied by STR Global. Improvements have also been made (and continue to be made) both to monthly reports and the online reporting platform.

A census of serviced and non-serviced accommodation is being conducted in late 2010 / early 2011 as part of this survey; it is planned to repeat this census every second year

This survey is a statutory requirement – the data collected is submitted to Eurostat.

### **Annual Survey of Visits to Visitor Attractions**

The survey of visits to visitor attractions is a measure of performance in the attractions industry. Attractions are asked to provide annual visitor numbers alongside other key information such as entrance fees and visitor profiles.

All English visitor attractions – some 7000 in total – are invited to participate in the survey, and are given the choice of answering online or by post. Each year, between 25% and 30% of those invited (i.e. just under 2000 attractions) return their questionnaires, and from 2009, the survey has been augmented by data from ALVA (Association of Leading Visitor Attractions) for some of the country's larger attractions. The survey is co-funded at present by English Heritage and the MLA (in 2011 – by English Heritage only)

### **Quarterly Attractions Monitor**

The Attractions Monitor was introduced in 2006 to provide a regular update on sector performance through the year. At the end of each calendar quarter, a sample of attractions is asked to provide information about visitor numbers, performance, and optimism for the coming period, as well as responding to a “hot topic” question relating to a current issue. Typically, some 300 attractions respond each quarter, and data is augmented with visitor numbers from a similar number of English Heritage properties.

### **Accommodation Business Confidence Monitor**

The Accommodation Business Confidence Monitor was launched in 2010 to provide fast feedback on accommodation sector performance at key times of the year (January, Easter, May Bank Holiday, August Bank Holiday and Autumn Half Term). Businesses are asked to answer questions on overall performance, profitability, different types of visitor and confidence for the coming period, and like the attractions monitor, the survey also includes “hot topic” question options.

### **Domestic Industry Panel**

Three times a year, senior figures in the tourism industry are asked to respond to a semi-structured questionnaire, which covers performance and profitability measures, but also delivers an exploration of the reasons for current trends and a discussion of the issues likely to impact future performance. This research is conducted internally by VisitEngland and so does not incur any costs.

### **Consumer Attitudes**

#### **Brand, Communications and Satisfaction Tracker**

The VisitEngland tracker measures three elements of marketing and industry performance. With interviewing every week of the year, the survey provides an indicator of the current situation and allows changes over time to be measured. The survey covers the following areas:

**Communications:** - How many people are aware of VE advertising, what messages do they take out of it, and to what extent does it motivate them to want to take holidays in England?

**Brand:** What does “brand England” stand for compared to its competitive set? What relationship do domestic visitors have with the brand?

**Satisfaction:** How satisfied are domestic visitors with the breaks they take in England? What are the drivers of this, and what destinations contribute most, and least, to visitor satisfaction?

The survey is currently under tender; once this process is complete and the new contract awarded, the satisfaction element of the tracker will be expanded and refined to become the national measure of visitor satisfaction.

#### **“Staycation” Research**

Since late 2008, VisitEngland has regularly measured the impact of the economic climate on holiday attitudes and intentions. It is expected that this measurement will continue in some form into 2011.