

travel & tourism News

A newsletter from TNS Travel & Tourism

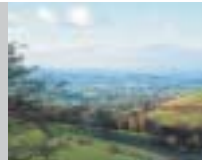
Issue 3 March 2005

In this issue:

A year of change
P2



Branding North Wales
Borderlands
P3



Edinburgh
Festival
P6



Destination England - How well does it deliver?

What do British holidaymakers really think of England? What opportunities are there for persuading more of them to 'enjoy England' in the future? And exactly who and what should be the priorities?

The British take over 70 million holidays in England each year, spending a hefty £12 billion in the process. Some of these are purely for leisure, others may be combined with visiting friends and relatives. But what really drives these people? And more importantly, what could the English tourism industry do to encourage them to take even more trips.

In spring 2004 VisitBritain commissioned TNS Travel & Tourism to conduct a study designed to provide the answers to a number of key questions:

- What are the key drivers of visitor satisfaction and their relative importance?
- What retains visitors and persuades them to recommend England as a holiday destination?
- Which elements of the England product promote visitor retention and referral?
- How does England perform on the delivery of products for key visitor segments?

We conducted this study using the TRI*M model. TRI*M is an internationally proven system that enables the measurement, management and monitoring of a company's stakeholder relationships. Developed in the early 90's TRI*M has now been used in thousands of programmes for companies worldwide, allowing us to build an extensive benchmarking database. This means we could compare how well England performed against other destinations.

Comparing this to other TNS studies, we found that although over half of the visitors to England can be classed as Apostles, i.e. both loyal and highly satisfied, there are more Potential Rebels than one might have expected (the average being 14%). The Overall loyalty / satisfaction rating towards England - the TRI*M index - was 74. This is higher than the average TRI*M index for all the studies TNS has carried out, which is 69, but lower than the average TRI*M index for the tourism sector, which is 78.

All visitors to England



So, why does England have such a relatively low satisfaction / loyalty rating: what are the specific factors that people don't like about it, and what are the 'moments of truth' that make the difference between a visitor returning to England or looking elsewhere for a short break? By grouping factors into real relevance and claimed importance, TRI*M helps us to identify the true motivators and opportunities. But it's only when we add a third dimension - satisfaction - that we really see how well England delivers.

One thousand people were interviewed and then we applied the standard TRI*M indicators to categorise visitors to England into four basic types, depending on their satisfaction vs. loyalty rating, as the chart on the right depicts.

Respondents to the survey - who had all taken at least one holiday or short break in England during the last 12 months - were asked to give ratings against 32 separate factors, ranging from Unspoilt Countryside to Architecture and Major Projects



the sixth sense of business™

A year of change



Following the acquisition of NFO WorldGroup in 2003, TNS has reinforced its position as one of the world's leading market information groups, providing market measurement, analysis and insight through our global network of operating companies in 70 countries. Working with national and multi-

national organisations, TNS helps our clients to develop effective business strategies and, in turn, enhance relationships with their customers.

In the UK, TNS has created a series of business units which are organised on a sectoral basis, designed specifically to meet the broader information needs of our clients. TNS Travel & Tourism is one of those business units and brings together the established expertise in the tourism and leisure industries which was previously offered by the team working for NFO WorldGroup, (formerly System Three) and the relevant experience of staff who had previously worked within the Social and Transport team at TNS.

TNS Travel & Tourism has research staff based in Richmond, Surrey and also in Edinburgh and has become established as one of the leading

providers of research and consultancy services to companies and organisations within the travel, tourism and leisure sectors, both within the UK and Europe. As you will see from the contents of this newsletter, we have a wide range of clients from both the public and private sectors.

Whether you are someone with whom we have worked for a number of years or someone who knows very little about TNS Travel & Tourism and its staff, we hope that you will find something of interest in this newsletter and we look forward to working with you in the future.

➔ Tom Costley

Head of TNS Travel and Tourism
t: 0131 656 4022
e: tom.costley@tns-global.com

T&T snippets

Excel Viewer

Given the volume of data produced from many surveys and the opportunities for sub analysis, TNS Travel & Tourism has developed a way of providing data in electronic format using a Excel Viewer. This provides the client with the opportunity to easily filter and analyse the responses provided by respondents in key groups within the overall sample. A significant advantage of this method of providing outputs is that the data can be read through Microsoft Excel with no requirements for any proprietary research programs for access - hence, results can be readily distributed.

TNSInfo

Every day a host of information comes to us through a variety of channels. As a consequence, email boxes over-run, the collection of files and reports on desks becomes ever larger, and you have problems finding the right file on your PC. With this overwhelming supply of

information it can take as much time to retrieve the right information as to understand the research findings.

TNS has therefore developed a unique online solution for storing and sharing documents and other information. TNSInfo is a secure online client information service that allows the client to sort and organise key information in one place according to the organisation's needs. It also keeps the information up-to-date, allows you to customise your view, conduct searches, filter content and set up alerts to help you navigate and find the information and files - quickly and easily.

For more information regarding this, please visit www.tnsinfo.com

Sports

TNS Travel & Tourism have a great deal of experience of research in the sporting arena. For example, as well as the Scottish Football Association, we also undertake ongoing research work for the Scottish Rugby Union

and a leading Scottish football club. In addition, a national survey of sports participation is undertaken for sportScotland and we have also undertaken a number of studies over the years for sportEngland.

Quality of Experience in Forests

Since 2002 TNS have been working with staff from the Forestry Commission in England to measure levels of visitor satisfaction and opportunities for improvements at a number of their main sites. The results from this programme of surveys have helped to guide the development of facilities for mountain bikers at Grizedale Forest Park in the Lake District, the development of interpretation and information at Westonbirt Arboretum in Gloucestershire. Surveying has also been completed at Dalby Forest Park in North Yorkshire and Thetford Forest Park in East Anglia where over 600 detailed interviews were completed with users.

Destination England - How well does it deliver?

continued

and covering everything in between, including coast, culture and shopping. They were asked to rate each factor against two different criteria: firstly, how important is this factor in their decision to visit a particular destination for a holiday or a short break? And secondly, thinking about their most recent holiday or short break in England, how well do they think England performs on these different factors. By plotting all the different factors, we have been able to identify the following Strengths, Priorities, Opportunities and potential Savings for English tourism.

- **Strengths** are factors which are very important to visitors, and at which England is already recognised as excelling. They include **unspoilt countryside, quality of food & drink, interesting villages & market towns and cities to visit, facilities for walking, rambling or hiking and history & heritage.**
- **Priorities** are factors very important to visitors, but at which England is not currently

seen as excelling. They include **beaches and coastline and the chance to see wildlife in its natural habitat.** In some cases this may simply be an education issue, where the visitors aren't aware of how good the English product actually is, and in others it may be a genuine issue with the quality of the product.

- **Opportunities** are factors that have high real importance but lower stated importance and where England is recognised as performing very well. They include **range of local produce, arts & crafts, choice of camping and caravanning facilities, activities for children and myths, legends & folklores.** In fact, the TRI*M research shows that these are actually very relevant to visitors, so the opportunity here is to raise their consciousness of them.
- **Savers** are factors which the majority of our visitors see as neither particularly important nor relevant to England as a short break destination. They include **golfing, theme parks and**

locations which are connected with books, films, or rock and pop. For some sub-groups however these aspects of the English holiday product may have a greater influence.

In summary, amongst mainstream domestic markets, England's overall strengths lie in its built heritage and unspoilt countryside, while our biggest priorities and opportunities lie in developing the outdoors product.

How is VisitBritain using this information? The dedicated England Marketing team spends over £14 million a year on promoting England as a destination. Activities embrace a wealth of marketing activities, including television advertising, inspirational brochures, websites, PR and more.

If you are keen to find out more about this research, or to discuss how TNS can help your business or organisation within the field of customer satisfaction and retention, contact

➔ **Jim Eccleston.**
t: 0131 656 4025

Attitudes and branding

Branding North Wales Borderlands



The North Wales Borderlands is a partnership between three local authorities in North East Wales -

Wrexham, Flintshire and Denbighshire and since the mid 1990s, the three local authorities

have worked in partnership to promote North East Wales as 'The North Wales Borderlands'.

Research undertaken by TNS Travel & Tourism on behalf of the Tourism Partnership North Wales, showed that the North Wales Borderlands as a much younger brand has suffered from a lower profile than other areas in North Wales. That said, the research indicated that when respondents spent time looking at some of the marketing materials and promotional print for the area, they were often surprised and generally much more positive. This illustrated that the area had more to offer than expected and with better marketing activity to support the area, its profile could be raised considerably.

cont. p4

Branding North Wales Borderlands *continued*

Consequently, during 2004, TNS Travel & Tourism undertook a further in-depth study of the North Wales Borderlands, including an analysis of the area's visitor profile by using results from the North Wales Visitor Survey 2003 and group discussions with various market segments in England. The aim of this study was to evaluate current branding and marketing activities; provide recommendations for any improvements and give effective recommendations regarding 'best prospects'.

Some of the key results obtained from the project included the following:

- Ageing visitor profile with 53% classed as Empty Nesters and less upmarket than the majority of similar visitor surveys in the UK.
- Several perceived strengths such as: beautiful, 'unspoilt' countryside and scenery; opportunities to enjoy the outdoors; friendly, laid-back people and fascinating culture and traditions (amongst the older market).
- 'Best prospects' were seen to be groups such as Independent Adults from the neighbouring English regions, who are interested in and searching for more quieter areas, which offers a mix of outdoor activities and good accommodation.
- Other marketing opportunities identified were joint packages with Chester and to establish the area as 'unexplored' and as a good alternative to the Lake District and the Yorkshire Dales.

To obtain more information about studies undertaken in Wales or branding related issues contact

Jim Eccleston t: 0131 656 4025

Welsh woodlands

In November 2004 fieldwork for a 12 month survey of users to 13 sites managed by the Woodland Trust Wales was completed. A total of 510 visitors were interviewed and automatic people counters were installed at six sites.

The results of the survey of visitors and outputs from the people counters will provide a wealth of information regarding volumes and patterns of usage and profile of visitors at their sites. Some of the key results obtained from these surveys have included the following:

- During the first half of 2004, the majority of visitors to Woodland Trust sites in Wales travelled less than 3 miles to reach the wood (58%).
- In Wales around half (54%) of visitors were classed as Empty Nesters (over 45, no children), a similar proportion to that recorded in Scotland during 2001 (48%).
- In 2004 the main aspects of the woods most liked by visitors included peace and quiet, solitude, scenery, the variety of trees and opportunities for walks.

To obtain more information about studies relating to outdoor recreation or countryside issues contact

Duncan Stewart
t: 0131 656 4026

Countryside recreation

Tourism State of the Art II

International Scientific Conference

27-30 June 2004

University of Strathclyde,
Glasgow



In June 2004, TNS Travel & Tourism presented a paper at the international scientific conference 'Tourism State of the Art II', held in Glasgow at the Scottish Hotel School. The paper focused on the recreational aspect of the countryside and stressed the importance of researching the natural environment and its relationship with tourism and leisure. The questions that the paper aimed to answer were: What are the crucial factors driving the quality of visitor experience in a countryside recreation context and how may this be researched? What type of knowledge can help managers to enhance visitors' quality of experience?

It was argued in the paper, that the development of countryside tourism and recreation needs to be based on an insight into the experience sought for. Therefore, wider definitions and methodologies than traditional satisfaction measurements are required. The paper presented an alternative research approach where measuring the importance of the factors likely to influence satisfaction and the visitors' experience is crucial in understanding visitor satisfaction.

To obtain more information about studies relating to outdoor recreation or countryside issues contact

Duncan Stewart
t: 0131 656 4026

Visiting forests



In February 2005 TNS Travel & Tourism will complete fieldwork on a 12 month survey of visitors to forests managed by the **Forestry Commission**. The survey has involved the monitoring of visitor numbers at 34 forests throughout Wales to help determine the profile

of visitors, the activities they are undertaking, opportunities for improvements and economic impacts. Similar surveys are on-going at 38 forests in Scotland as part of a rolling programme of visitor monitoring which, by 2007, will involve counting and interviewing of visitors in every forest district in Scotland.

The information collected from these surveys will be used by the Forestry Commission in Wales and Scotland to demonstrate the recreational value of forestry to a wide spectrum of user groups ranging from local dog walkers to tourists. Results obtained during the first 8 months of surveying in Wales have included the following:

- Two in three visitors to forest in Wales were male (65%) and the majority were aged over 35 (80%).

- Most visitors were on a repeat visit to the site they were interviewed at with over half visiting at least once a week (54%).
- Two-fifths of visitors were dog walkers (40%).
- The majority of visitors stated that the forest and its facilities were the only reason for their trip or very important in their decision to visit the area (61%).
- Visitors spent an average of £12 each in the local area during their trip to the forest.

To obtain more information about studies relating to outdoor recreation or countryside issues contact

➔ **Duncan Stewart**
t: 0131 656 4026

Sport and leisure

Scottish Football Association - Regenerating Scottish football

In the absence of any previous consumer-based research, the Scottish Football Association identified the need for the collection and analysis of information and primary data. This covered three key areas - the role of the SFA; the marketing and exploitation of key SFA events; and the marketing and exploitation of the Scottish international football team.

TNS Travel & Tourism were appointed to undertake this major exercise, and the project was awarded the best research study in the Travel, leisure and entertainment category in the 2004 Research Awards sponsored by 'Marketing' magazine.

In the first instance, consumer research was required to establish whether the SFA owned or had primary responsibility for a brand that was recognised by the consumer. Both qualitative and quantitative research approaches were employed and this research identified the

Scottish Cup and the Scotland team as the two primary brands under its banner.

Armed with these results, the SFA set a number of key targets for the international brand and the subsequent ongoing research of the marketing activity undertaken has demonstrated a significant degree of success.

A 52% increase against the target for attendance at the Euro 2004 qualifying matches was achieved, as well as a 30% rise against the target for the sale of Scotland replica shirts. The number of Scottish adults that were 'very proud' of the team also rose from 21% to 26%.

Additionally, after 18 months, Safeway had achieved an awareness level of 53% as main sponsor of the international team compared with a high of 27% for the previous sponsors, Scottish Gas. Subsequent qualitative research has also been undertaken to gauge



reactions to the improved 'International matchday experience' and to develop a marketing campaign based around the 2006 World Cup qualification matches.

If you are keen to find out more about this field of research, or to discuss how TNS can help your business or organisation within this area, contact

➔ **Jim Eccleston**. t: 0131 656 4025

Edinburgh's festivals



In June 2004 TNS Travel & Tourism were commissioned, together with economic consultants SQW, to undertake a survey of attendees at Edinburgh's festivals. The results of the study will be used by City of Edinburgh Council and their partners to demonstrate the economic value of each of the many festivals which take place in Edinburgh through the year. Questions asked of attendees have included:


- The influence of festival events in decisions to visit Edinburgh and Scotland generally;
- Sources of information used when planning trips;
- Types of accommodation used and satisfaction with the availability of places to stay;
- Length of stay in Edinburgh, the Lothians and elsewhere in Scotland;
- Levels and categories of expenditure.

Over 2,500 interviews were undertaken with attendees to the main summer festivals which included the Edinburgh Fringe, Military Tattoo, International Festival, Film Festival and Book Festival. A further 1,700 interviews will be undertaken at the main winter and spring festivals which include Edinburgh's Capital Christmas and Hogmanay, the Easter Festival and the International Children's Festival.

This project has provided an opportunity for TNS Travel & Tourism to work with TNS Media

Intelligence who have undertaken an analysis of the value and main characteristics of press and broadcast coverage generated as a result of the festivals.

Further information about this study can be obtained from

 **Duncan Stewart**
t: 0131 656 4026



Travel and accommodation

What type of traveller are you?



Would you consider yourself to be a Destination Dazzler, a Top Notch Tourer, a Confident Culturalist, the Discrete Elite or a Passive Passenger when you go on holiday? These are the five market segments which have been identified by TNS Travel & Tourism in a recent study undertaken on the premium travel market. Red Media, an innovative media planning and media agency wanted to understand more about the characteristics and attitudes of those consumers who are considered to be premium travellers. The premium travel market was defined as being those who spent a minimum of £800 per person per week on travel and accommodation, representing around 10% of the overall holiday market.

A detailed telephone survey was undertaken with a sample of over 800 respondents throughout Britain

who qualified as being premium travellers. Detailed multivariate analysis was undertaken and resulted in the market being segmented into these five discrete groups. The largest segment, which accounted for around a third of premium travellers was labelled Destination Dazzlers who were characterized as people who wanted to impress others by their choice of holidays, who were looking for luxury, quality and good service because their holiday was an important purchase. The survey also investigated the media which these people used and also their main sources of information about holidays and the booking channels which they tended to use.

Further information about this study can be obtained from

 **Carol Diamond.**
t: 0208 334 4224

Monitoring the performance of the tourism industry: Occupancy Surveys

The Scottish Accommodation Occupancy Survey, undertaken by TNS Travel & Tourism on behalf of VisitScotland, provides the most comprehensive and up-to-date information on the demand for tourist accommodation in Scotland. The rapid turnaround of results within several weeks of the month in question means that the survey is a key indicator in monitoring the performance of the tourism industry in Scotland. Recently, the survey featured in a BBC report, highlighting a positive trend in accommodation bookings in the North East of Scotland.


Occupancy Surveys have been undertaken in Scotland since the 1970's and have evolved considerably into the series of accommodation surveys which exist in Scotland today covering hotels, guest houses and bed and breakfasts,

self-catering properties, caravan and camping parks and hostels. Indeed, The Scottish Accommodation Occupancy Survey is now the most comprehensive occupancy survey in the UK and each month more than 1,500 accommodation providers send us, either by post, fax or e-mail, details of the number of their beds, rooms, units or pitches available and occupied each night.

In return for participation respondents receive details of their occupancy rates along with average for their local area and Scotland. They also receive a more detailed summary sheet on occupancy rates in their sector by tariff, size of establishment and grading. Many of the participants find the outputs we provide them invaluable as a business development tool. The information is used to monitor their performance and compare it with

local and national trends, as well as assisting with loan applications, planning applications and rating assessments.

TNS Travel & Tourism are the leading market research agency in the conduct of occupancy surveys with over fifteen years' experience. We undertake occupancy surveys in Scotland, Wales and Guernsey. TNS are also the UK Occupancy Survey Co-ordinator with responsibility for monitoring and amalgamating regional occupancy data to produce statistics for the UK, which are submitted to Eurostat each month.

Further information about these studies can be obtained from  **Gillian Thomson, Eileen Henderson or Vicky Wilson.**
t: 0131 656 4024

Methods and products

Retaining your customers using



TRI*M™ enables TNS clients to gain vital, ongoing information and insights about their relationship with stakeholders, be it customers, employees or shareholders. TRI*M is a high-powered, tailored system which allows for the effective measurement, management and monitoring of these relationships. In its simplest form TRI*M can be implemented with the use of a four preset TRI*M questions but further implementation can be used to focus on five areas of a company's performance:

1. The business situation in terms of levels of satisfaction and loyalty - groups your customers according to the relationship they have with your company so you can gain an accurate picture of your customer base.

2. Identifying the key drivers - analyses what is motivating your stakeholders, where your hidden opportunities and weaknesses lie, and where you could potentially be saving money, thereby creating and supporting effective investment decisions.

3. Strengths and weaknesses compared to the competition - identifies the opportunities which will give you a real competitive advantage over your competition.

4. Switching patterns and profiling - identifies which of your customers are at risk of defecting by analysing their personal commitment to the brand. Also shows where the threats are coming from, opportunities for

customer acquisition, and customer segment profiles, allowing for increased targeting of sales and marketing strategies.

5. Overall performance (level of customer retention) - a performance score shows where the company stands relative to its own goals and to its competitors.

In developing these programmes for companies worldwide, TNS has built an extensive benchmarking database, with more than 5,000 studies from over 900 companies, against which TNS clients can compare their results at a country / regional level and by industry sector.

For more information please contact your TNS Travel & Tourism office.

Qualitative research

At TNS Travel & Tourism, we pride ourselves in providing a full suite of research techniques and approaches. For example, in addition to a wide range of quantitative methodologies, one of our core strengths is in undertaking all types of qualitative research - from standard focus groups, to mini groups, triads and depths amongst many others.

Reinforcing and highlighting our expertise in this area is that two of TNS' experienced qualitative researchers are now available to undertake a number of travel, tourism and leisure projects under the 'TNS Travel & Tourism' banner. Frances Yelland heads up the qualitative practice for TNS, with specific responsibility for training, quality standards and practices and business development, and she has a

direct involvement in all of the major qualitative studies within the tourism arena. She has been a practitioner for much of her career, having worked in over 70 countries worldwide. Her areas of expertise are brand transformation and communications and she has worked with many travel related global companies such as British Airways, Airbus Industries, Visit Britain and the Wales Tourist Board helping them with their marketing and services issues.

In addition to Frances, Rob Andrews is another experienced qualitative researcher whose skills are also being utilised within TNS Travel and Tourism. Rob has been with TNS since 1998 and during this time, he has worked on many tourism and leisure projects. Rob is now working closely with colleagues in TNS Travel and Tourism to further develop our qualitative expertise in this area.

For more information please contact your TNS Travel & Tourism office.

TNS Travel & Tourism

Meet the team

Front Row:

Wayne Miller

Managing Consultant, Richmond

Tom Costley

Group Director, Edinburgh & Richmond

Middle Row:

Laila Gibson

Consultant, Edinburgh

Carol Diamond

Managing Consultant, Richmond

Jim Eccleston

Director, Edinburgh

Back Row:

Gillian Thomson

Managing Consultant, Edinburgh

Eileen Henderson

Consultant, Edinburgh

Shehnaz Hansraj

Consultant, Richmond

Annette Hunter Data Preparation Assistant,
Edinburgh



Duncan Stewart Managing Consultant, Edinburgh

Vicky Wilson Research Executive, Edinburgh

Insert:

Ann Bellchambers

Director, Richmond



the sixth sense of business™

TNS UK Travel & Tourism

19 Atholl Crescent
Edinburgh EH3 8HQ
Midlothian
t: 0131 656 4000

e: travelandtourism@tns-global.com

36 Paradise Road
Richmond TW9 1SE
Surrey
t: 0208 334 4200

e: travelandtourism@tns-global.com