

travel & tourism News

A newsletter from TNS Travel & Tourism

Issue 4

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TNS wins major tourism contract



In 2005, TNS Travel & Tourism secured a five-year contract to run the United Kingdom Tourism Survey on behalf of VisitBritain, VisitScotland, Wales Tourist Board and the Northern Ireland Tourist Board.

The survey is the main measure of UK domestic tourism volume, value and characteristics and provides an industry barometer of tourism spend among people in Britain. It has been running for some 15 years and is a vital source of information for the tourism industry.

This major contract is undertaken on one of TNS' face-to-face omnibus surveys - RSGB Omnibus. Some 2,000 in-home computer-assisted personal interviews (CAPI) are

undertaken each week, meaning that 100,000 people are interviewed each year on their tourism trip-taking behaviour. Fieldwork began in early May 2005. This methodology represents a departure from the previous method used which relied on telephone interviewing rather than a face-to-face approach.

The findings will be used to provide the definitive volume, value and characteristics information on tourism in the UK by UK residents. In addition, UKTS also directly informs National Tourist Board and Government tourism policy and helps in the development of targeted marketing campaigns.

This is an extremely strong win for TNS which highlights the strength of the division and its ability to undertake large-scale, comprehensive surveys. By delivering high quality research, the results can be adopted as an accurate barometer for the

industry, indicating the health of the sector.

Using innovative reporting systems, including TNS Info - a bespoke web-based information portal - TNS is able to communicate results rapidly to a wide range of users. This enables the survey findings to be accessed and acted upon swiftly.

Angus James, Head of England Research, VisitBritain commented: *"TNS was selected, among other criteria, for its track record of consistently managing and delivering large projects of this scope"*

The first results to emerge from the survey are likely to be made available by the National Tourist Boards during the first few months of 2006.

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the sixth sense of business™

A year of change



Our success in being confirmed as the contractor for the United Kingdom Tourism Survey (UKTS) during 2005 has reinforced our position as the leading tourism research agency in the UK. Allied to our role as the coordinator for the UK Occupancy Survey, covering serviced accommodation, this provides us with unique insight and understanding of the key trends in the UK tourism market. One of the particular challenges we see, in conjunction with the UK National Tourist Organisations (sponsors of

both studies), is in ensuring that this valuable information on trends within the UK tourism industry is effectively communicated and made readily accessible to interested parties.

While the gathering and presentation of trends information is critical within the tourism industry, we also recognise that monitoring of customer satisfaction is assuming increasing importance. Whether you are a destination, airline, hotel, leisure attraction or even a travel-related website, you are looking to generate as high a level of repeat visits as possible and also, for customers to recommend your product or offering to others. Merely measuring overall customer satisfaction may not be adequate in this regard - it is also necessary to examine the performance of the individual elements of your product or offering and relate these to the expectations of customers. There will also be a need to benchmark your performance against that of your competitors to establish your relative position with consumers.

We believe that this will be a priority in travel, tourism and leisure research in 2006 and we look forward to working with companies and organisations in delivering actionable analysis.

The delivery of information online and the ability to purchase via the Internet or by email has had a significant impact on the travel and tourism industries. Consequently, the argument for using online research methods to interview respondents about their travel plans and preferences is becoming more appropriate to make to clients. As described in more detail in this newsletter, we see the Travellers' Panel as being a valuable product for accessing a variety of market segments - both within the UK and elsewhere.

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Online opportunities in Travel & Tourism research!

6th dimension™ - Travellers' Panel A unique database for research amongst different types of travellers, tourists and holiday takers.

Traditionally, it has always been extremely challenging for tourist boards, transport providers and tour operators to conduct research amongst specific target markets. Certain markets are particularly difficult to reach, reflecting their 'niche' characteristics and often wide, geographical distribution. This has made research in advance of new product development, or to evaluate the opinions and views of specific niche segments, particularly difficult and often prohibitively expensive.

TNS Travel & Tourism have just launched our Travellers' Panel, which offers a large database of respondents, pre-identified and ready to help with a wide range of research needs. Key information is held on the travel and holiday-taking characteristics of several hundreds of

thousands of respondents throughout the UK, Germany, France, Italy, Spain and the Netherlands.

In addition to their travel and tourism characteristics - frequency and destination of trips, trip purpose, transport used, accommodation stayed in, types of holidays interested in - we can also add additional value to this information through the extensive profiling our panel has undertaken. This means, for example, we can identify people who take intercontinental holidays, who buy particular newspapers and magazines, or bank with particular banks. Therefore, we can give you much further insight into their existing buying behaviour. The panel can be used for a wide range of travel and tourism research

applications, including:

- Audience/visitor segment measurement
- Awareness and opinion-based research
- Niche-market studies
- Brand exposure measurement
- Penetration and profile of different types of tourists across six key geographical markets
- Tracking studies
- Changes in perceptions and behaviour over time
- Media access and readership
- New product development

To discuss the Travellers' Panel, and how you can use it, please contact :

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Spa Quality Standards Research



With the increased demand for and supply of establishments offering spa products and experiences, the spa industry in the UK is at a crucial stage of its development process. However, at present there is a lack of independent, clear quality standards which are accepted by the industry and understood by the consumer. On this basis, VisitBritain in association with the British International Spa Association and the Spa Business Association commissioned TNS Travel and Tourism to undertake a programme of research to assess

consumers' needs, understanding, awareness and experience of spas in the UK which would assist in the development of a programme of quality standards.

A two-stage qualitative methodology was adopted for the conduct of this research involving six focus groups and more than 40 in-depth interviews with spa users throughout the UK.

The results showed that consumers welcomed the introduction of a quality standards scheme. In particular, consumers believed it would facilitate a comparison between spas and offer a guarantee of quality by identifying the 'genuine' spas. The most important aspects to be included in a quality standards scheme were cleanliness, warmth and helpfulness of staff and noise levels.

The general preference amongst respondents was for an accreditation scheme whereby spas would be required to fulfil a basic set of standards to become an accredited

spa rather than a rating scheme based on 1-5 stars. It was also recommended by a significant proportion of respondents that further information on individual spas e.g. the types of facilities on offer would be very useful in addition to the basic accreditation.

The research also revealed that the key motivations for visiting spas were to relax and unwind from the pressures of work and day to day life as well as to be pampered. Health and physical well-being reasons were also relatively important but more so on a secondary level compared to relaxation and pampering.

VisitBritain are currently using the research to develop a programme of quality standards and intend to launch a pilot version in 2006 with a view to rolling out a programme throughout the UK in early 2007.

Further information about this research can be obtained from:
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The Growth of Online Research

In recent years online research has exploded throughout the UK and the world. Illustrating this, within TNS in the UK over a quarter of quantitative research is now undertaken online. Yet as recently as early 2003, cost effective online research to a suitable robust and acceptable standard of quality was still relatively new in the UK.

So why the move to online?

Advances in technology and changes in consumer attitudes and behaviours have encouraged the switch to online approaches. Traditional methods of data collection are being hit hard by direct and tele-marketing. As the amount of 'junk mail' increases, response rates to postal questionnaires are steadily decreasing and approaching consumers by telephone is increasingly difficult due to telephone preference services. Consequently, as refusal rates increase, research costs increase. Conversely, as more people go online

and technology and research software advances, the cost of online research has decreased.

In addition to lower costs, online approaches offer faster data collection, reduced interviewer bias, the ability to analyse data as it is collected and better quality data. Research undertaken by TNS earlier this year highlighted some significant differences in the quality and level of detail obtained. Parallel tests were administered using online and face to face methodologies.

Some of the key findings concluded that online respondents:

- give richer responses with greater depth and emotion
- give notably longer responses to open ended questions
- are more likely to spend additional time completing the survey
- are less self-conscious and so more honest in their responses

Online approaches are suitable for both consumer and business audiences. TNS Travel & Tourism has just completed a survey on behalf of VisitScotland amongst the tourism industry. In similar previous studies, an online approach was ruled out due to under representation of members with email addresses. In 2005, the database had been updated considerably and it was clear that an online approach would represent the most cost effective means of delivering a larger and more robust sample size than the previous studies. Further, an online approach would give businesses time to gather all the necessary information required for this detailed study, improving the accuracy of results. Results are now in and once again the online approach has been successful in generating a robust sample with good quality data.

For more information on online research and this study contact:

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T&T snippets

Advertising Tracking

During 2005 we undertook tracking of the impact of Wales Tourist Board's domestic advertising campaign. By including questions on our UK-wide omnibus, Omnimas, it has been possible to track recollection of television and press advertising, impacts on perceptions of Wales as a holiday destination and propensity to visit.

During the year some 8,000 UK residents were interviewed in their homes across 5 waves of surveying. All interviews were undertaken using multi-media technology, which allows the play back of television advertisements and

display of press adverts in colour during the interview.

TNS Travel & Tourism Joins Style Account

TNS Travel & Tourism has been welcomed to the new team of service suppliers that will help Glasgow Marketing Bureau deliver the programme for 'Glasgow : Scotland with Style'.

The 'Glasgow : Scotland with Style' brand aims to drive the Glasgow City Region up the league table of cities in terms of employment, investment and increased tourism revenue. Previously the campaign was delivered by a consortium of five companies, covering advertising, design, media, evaluation, promotional goods and web design. In 2005 a review of the marketing

accounts was undertaken and the decision was made to commission the accounts separately.

After a tough pitch process, TNS Travel & Tourism was awarded the monitoring and evaluation account. In the coming year TNS Travel & Tourism will be working closely with Glasgow City Marketing Bureau and the other suppliers - Maguire Advertising, Feather Brooksbank, Orb International and BD-NTWK - to guide strategic development of brand activity.



TNS Travel & Tourism

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