



VisitScotland Information and Sales Strategy Research

This is one of five pieces of related research commissioned by VisitScotland in 2005 as part of its information and Sales Strategy

Consumer Research
COMPARATIVE DESTINATIONS RESEARCH
Technology Research
Multi-Sectoral Benchmarking Research
Industry Research

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VisitScotland commissioned TEAM to complete the following seven case studies:

NEW ZEALAND

Tourism New Zealand (TNZ) is the NTO for New Zealand. As an organisation, its primary focus is overseas marketing and it has a number of overseas offices. In terms of information provision, their main emphasis is on the internet. This is seen as primarily providing off-shore (as opposed to on-shore) information. Recent developments have included the launch of a new **travel planner** within the main consumer site. This enables the consumer to develop their own itinerary (with dates, activities, maps etc.)

TNZ collects product data itself for its websites. This is not directly used within other elements of information services in New Zealand. Consumer data is not captured in a structured way.

TNZ also manages international telephone calls. In Asian markets, this is through its overseas offices. In primary European and North American markets, calls are transferred through to its International Call Centre. This is located in New Zealand and has been contracted out to a private company. Domestic enquiries are managed through the Visitor Information Network (see below).

Brochures still form part of the TNZ marketing / information mix but their role has been questioned internally.

The Visitor Information Network Incorporated (VIN Inc) is the officially recognised provider of New Zealand information. It is a partnership of TNZ, Regional Tourism Organisations and Local Government. They, with TNZ, recognise the importance of having an effective and high quality network of visitor information centres, dedicated to delivering free, comprehensive and objective information. *The VIN Inc* is a membership-based organisation to which individual centres belong. The management, administration, and marketing of VIN Inc is funded by TNZ. TNZ have three staff members dedicated to the VIN (they are situated in The Tourism Development Division of TNZ).

The day to day running of the centres is managed directly by the RTOs, or indirectly via contracts to individuals or organisations. Most centres are owned and funded by Local Authorities – some larger ones are self-funding. In addition, some government funding is available for training.

The i-SITE Visitor Centres are independently assessed using criteria developed by Qualmark (New Zealand system of accreditation for a range of operators). Centres are given scores highlighting areas for improvement and year-on-year benchmarks. Accreditation to the network ensures that staff are knowledgeable and provide objective, quality information.

FINLAND

The Finnish Tourist Board (FTB) is responsible for the promotion of Finland, but also quality and product development. ICT is regarded as a key tool within FTB's operations and central to this has been the development of their PROMIS database. This provides a wide selection of up-to-date tourist information on travel products, and services for the whole of Finland, though the quality and depth of information varies.

PROMIS is a data source for WAP (launched in 2001 by FTB but discontinued due to limited take up), brochures, FTB offices, Call Centre Europe, and via third parties own brochures, web services etc.

FTB works with partners both on distribution of data and on its production. The majority of data within PROMIS is collected and maintained by PROMIS data producing partners. There are currently approximately 80 external partners who have signed an agreement with FTB to become PROMIS data producers. These include transportation companies, hotel chains, regional organisations, and national associations.

In addition, to electronic information distribution, FTB does operate an information centre located in Helsinki. There is also a wider network of information centres provided by regional tourism organisations. FTB also operates a Contact Centre. This was brought in-house in 2004 and is co-located in the information centre.

IRELAND

Fáilte Ireland is the National Tourism Development Authority for Ireland. It currently has responsibilities for marketing, product development, training and research. There is a tier of six regional authorities (RTAs) below Fáilte Ireland. However, following a review of structures, Fáilte Ireland will become responsible for the establishment of Regional Tourism Partnerships, which will have responsibility for regional tourism development.

Within Ireland there is a network 68 Tourist Information Offices (TIOs), currently operated by the RTAs. Responsibility for these will pass to Fáilte Ireland to create one network. As part of this re-structuring, it is also recommended that the TIOs are reviewed to create a more consumer focused network. Potential options include a small number of "super TIOs" in key areas, a larger number of season based offices, a range of newer flexible tourist office models to include 'technology-only' points, and the use of third parties to operate a network under a common brand.

Gulliver is the electronic information and reservation network for the Irish tourism industry. It was developed through a public (Bord Fáilte and the Northern Ireland Tourist Board) / private (FEXCO) partnership. It is now operated commercially as Gulliver Infores Services Ltd – the Irish Tourist Boards still together retain a 26% shareholding.

Within Gulliver, the Information side and Reservation side are separate businesses. Gulliver InfoRes owns the database and software and earns commission from making bookings. Reservations can be made on-line or through the International Call Centre or through the TIOs.

As a separate business Gulliver handles the Tourist information queries to Fáilte Ireland through the Call Centre. For these calls Gulliver acts as agents for Fáilte Ireland and calls are answered differently from reservation calls that come directly to Gulliver.

Gulliver is also responsible for data management and they work with partner organisations, such as RTAs, to ensure data is up-to-date. An annual update of operators is undertaken. Businesses that are members of Gulliver can also electronically link into the system through phone, fax or GullNet (an extranet service). Gulliver can also link to businesses, which allocate rooms for Gulliver to sell directly.

BRITISH COLUMBIA

Tourism BC is responsible for tourism industry development, and for marketing British Columbia in Canada, the US and overseas (it has some overseas offices). It is supported by 6 regional DMOs and 3 Municipal DMOs (Victoria, Whistler and Vancouver).

Tourism BC delivers information services through four interlinked channels – the BC Visitor Information Centre network, HelloBC.com (the Call Centre), the Tourism BC website, and a series of Visitor Guides.

Tourism BC has a comprehensive database, which is the same for all Tourism BC's information delivery systems and technologies. In other words, information, transactions and fulfilment all use the same technology platform, and pull from the same inventory and feed the same consumer information database. The product database is also used by Tourism Victoria and Tourism Vancouver.

Tourism BC's view is that these different media must be equipped to meet differing visitor requirements, albeit it from a common database. For example, the Call Centre is *Planning*, while the VIC is *Doing*.

Consumer data is collected through the Information Centre network. Centres receive funding from Tourism BC, which is based on the number of enquiries they service. This is evidenced by a short report on the enquirer, which is then used for marketing or research purposes.

Tourism BC operates four strategic Visitor Information Centres itself, but co-ordinates a much wider network of 110 locally and/or regionally operated VICs. The network itself has a hierarchy of three different types of centre. The hierarchy is essentially determined by visitor volume, and different elements of the Tourism BC network have different capabilities. For example, Tourism BC's 'gateway' VICs can meet consumer requirements in all areas, including reservations and ticketing, and information for all parts of the province.

Tourism BC sets the policies and requirements, and generally oversees the operation of VICs in the province. This covers standard operating/counselling procedures, training, performance and monitoring requirements, and 'look & feel'. The VIC criteria do not include standard computer reservation systems at present. Tourism BC is seeing little or no growth now in Reservations, but transaction growth is coming from Ticketing.

Calls are handled centrally by Tourism BC, as the Call Centre, HelloBC 1-800 number is the only number in their external advertising. VIC telephone numbers are not advertised. There is a comprehensive website and Tourism BC is currently developing systems to encourage the use of its information in Third Party websites across BC.

Tourism BC also has a range of print - some are produced externally, although the key ones (Accommodation Guide, Vacation Planner, Outdoor Guide) are developed in-house, and these produce approximately \$1 million each year in revenues.

Victoria, British Columbia

Tourism has two main divisions – Marketing and Communications, and Operations. Operations is responsible for Visitor Information services. It is a membership organisation, with over 1000 members.

As with the Tourism BC network, Tourism Victoria's VIC relies on three main information delivery mechanisms. These are the Visitor Information Centre(s), the Call Centre (1-800 telephone), and the Website. All data on each of these is the same. It also produces a range of brochures.

Tourism Victoria operates one main Visitor Information Centre—one of the busiest in North America. Telephone calls are received and handled in-house—by Information Centre staff.

Funding for operations is provided by:

- Membership fees—paid in return for brochure placement, and counselling services.
- Reservations/Booking Commissions—a percentage paid out of transaction revenues
- Ticket Sales—a percentage paid out of transaction revenues.
- Advertising Revenues—e.g. poster ads inside the InfoCentre.
- Annual Grant from Tourism BC—based on the number of direct visitor-to-counsellor consultations.

Tourism Victoria has a comprehensive, mandatory, and carefully structured, three-week training programme for new Information Centre staff.

Tourism Victoria developed a computer mail system—a computer driven response system—in the 1980's. This system has been upgraded, but the original concept remains the same. Each long-distance enquiry (telephone, mail or e-mail) that requires a fulfilment response is entered into the computer. The computer's response is triggered by key words (accommodation, transportation, attractions, activities, car rental, etc). The computer then randomly selects compatible brochures or similar information, and these are mailed to the enquirer. A printout—with names, addresses etc.—is generated each month for each Tourism Victoria business member who has subscribed to the system.

Future priorities in Tourism Victoria include better market research (especially causes for increases and decreases in traffic), and more efficient, more comprehensive Reservations Systems. This is an important service, and a big source of revenue.

Netherlands

NBTC is the NTO for the Netherlands – its primary target is to increase the country's share (among European competitors) of international arrivals. It has a number of overseas offices. NBTC sees itself as mainly a marketing and promotion organisation. It does not differentiate between information and sales services, and other elements of the conventional marketing mix. Information and sales services are delivered primarily through the use of new media, and to a lesser extent printed material (of which less and less is produced). Neither NBTC's head office nor its offices abroad have face-to-face or telephone services. The only exception is the office in Cologne, which does operate a small call centre.

NBTC's information and sales services are focused on Holland.com and the Holland Database. This database contains detailed information on circa 30,000 objects in more than 40 categories. The database is maintained at NBTC's head office. Data is collected and updated by processing questionnaires annually. DMOs and other hospitality sector organisations are able to maintain the data of their members online, but most work is done (and certainly checked) centrally.

The Holland Database has a variety of outlets/functionalities - it is used:

- As an online search engine in the various websites in 8 language;
- As a call centre/outer office/counter version. Local DMO (see below) staff can use the online database while answering the questions of a visitor face-to-face or by telephone. However not many DMOs do so. They tend to use their own brochures, files, etc;
- For the delivery of data for print.

Pilots with public information kiosks are planned.

NBTC does not own a booking engine and does not facilitate online reservations itself, partly due to 'political' sensitivities with other Dutch DMOs. As a consequence, the Holland Database has been offered as an impartial platform. Accommodation providers who wish to be bookable can publish/link their own booking engine or that of a reservation partner in the Holland Database. NBTC also has partnerships with larger hotel chains and some DMOs, and publishes their booking engines at the appropriate place in the Holland Database. NBTC receives commission on each booking made.

NBTC does however facilitate the sales of online tickets for events etc. NBTC receives commission and charges for the facilities, extra developments etc.

Answering email is undertaken on a decentralised basis by overseas offices. Increasingly this is handled automatically, with a new email responder system. This is currently being implemented within the offices abroad. Email handling and consumer CRM are also now connected.

Information Centres (or VVVs) are operated by local DMOs. The VVVs tend to be similar to their UK equivalents and their sources of income include membership of local businesses, local government, commission from bookings etc. and sales.

DMOs differ in their responsibilities. They differ in whether and, if so, how they offer information and sales services. There is some focus on marketing and promotion, traditional VVVs, call centre services and booking facilities online and offline. Their ICT infrastructure also differs: some work with the Holland Databank and all its outlets/functionalities, others have had their own databases and booking engines developed in the last few years.

It is likely that, in the future, the Ministry of Economic Affairs will require DMOs to work together with NBTC on maintaining and using the Holland Database. This will only apply to those DMOs receiving financial support from the government.

NEW SOUTH WALES, AUSTRALIA

Tourism New South Wales is state funded. Its role includes the marketing of NSW destinations, working with and providing advice to industry, government agencies and other key stakeholders about the development of sustainable destinations; and, in partnership, growing and managing the destination.

It is supported by 15 Regional Tourism Organisations and a number of local authorities – these play a role in visitor services.

TNSW itself operates the Sydney International Airport Visitor Information Centre and three Visitor Information Services Kiosks around the city of Sydney for information only. These are operated with a mix of permanent staff and volunteers/trainees.

In addition, there are 173 accredited visitor information centres throughout NSW operated by other entities including Regional Tourism Organisations, Local Government, Local Tourism Associations and private operators through the VIC accreditation programme. This comprises Level 1, 2 and 3 centres.

Information Centres have to comply with the VIC Accreditation programme and sign an agreement/contract in terms of the standard with which they comply and the service they need to provide. They are however pretty autonomous.

TNSW has an in-house Call Centre, staffed by trainees. It provides general response handling. However, campaign response management and fulfilment is outsourced to call centres with 24/7 capabilities. Email enquiries are also managed through the in-house Call Centre.

In terms of data management, there is a State Tourism Data Warehouse (STDW), which is part of a national product database (ATDW). The industry can list their product /service details free of charge. This is the database that feeds the TNSW consumer web site.

TNSW does not try to cover all elements of the customer journey. Their role is to raise awareness, preference and intent to holiday in NSW destinations, and they use a range of media for this. Industry partners will then work solo or in partnership with TNSW to convert interest to actual bookings.

New technologies to deliver customised information represent a key area of change. However, even with the uptake of technology in the tourism industry, print remains an important part of the mix. TNSW have not discontinued print production, although quantities may have been reduced and the option of fulfilment online is always provided. Web is the primary call to action for campaigns.

SINGAPORE

Singapore Tourism Board (STB) is a government owned company. STB has its Head Office in Singapore and 20 regional offices spread over 8 regions.

STB are involved in every stage of the customer journey to differing degrees and they seem to see their role as supportive and informational, rather than aggressive marketers and bookers.

Singapore has 10 Visitor Centres (SVCs), all professionally branded and well located. Six SVCs are run and fully funded by STB, three are run by third parties. The majority of staff are temporary, with minimal STB staffing levels.

The SVCs offer the 'Uniquely Singapore' passports, with discounts at 40 tourism establishments and quarterly prize draws of S\$150,000 value (most prizes valued between S\$100 and S\$1,500). The airport SVCs also offer FREE 3 hour tours of Singapore for transit visitors and have recently introduced new transit incentive packages – bus shuttle to Little India, Tourist Day Pass (10 free journeys on the MRT rail service), free F&B vouchers and free use of shower facilities for those who have 'gone out' into Singapore.

The marketing focus is on product and service quality as well as the growing variety of things to see and do.

Looking ahead, STB are considering the possibility of hub and spoke, supported by un-staffed i-kiosks. At the same time, they are talking of new SVCs when casino developments and T3 at Changi are completed. There is some pressure to look at becoming a profit, rather than a cost, centre.

STB operate a toll free 24hr Touristline in Singapore and the UK. Other countries are served during office hours by the regional offices. Currently, the toll free number in Singapore is receiving around 6,000 calls per year. It is integrated with the corporate switchboard, so costs are kept down, but there is a consideration to outsource the service. STB are keen to retain the customer caring image of a 24hr call centre, but there is a question mark over its value to the overall business.

The call centre handles all e-mails – around 500 per month and rising.

Data management for the website is undertaken by STB. External businesses that have their information on the site contact individual departments of STB who will then either access the site directly or go through STB's web vendor to update the details. Trained STB staff have direct access to upload/edit/remove information on the site. Tourism businesses do not have access to update their information on the site.

In terms of customer data capture through the website, only email addresses are captured (when users sign up for the e-newsletter). Data is not captured systematically through the call centre or the SVCs.

STB has a website available in 12 languages – this attracts 250,00 unique visitors a month. In terms of other electronic information distribution, there are no kiosks at present, although there is a plan to develop one at the harbourfront, which will be fully interactive with the call centre (the screen will show the person they are speaking to).

Future challenges to Singapore Tourism Board regarding electronic information include:

- Podcasting (eg download mobile tours off the web before travel)
- Wireless secure transactions
- Video telephony
- 3G/GPRS