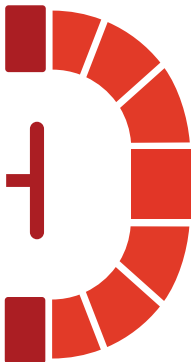
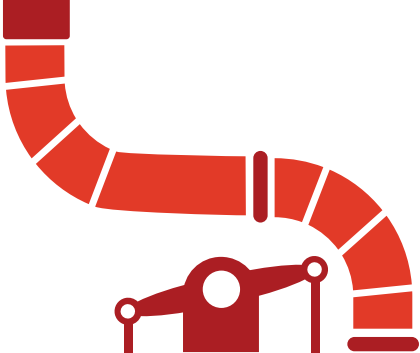




PartnersForEngland 

DELIVERING BETTER INTELLIGENCE

An Introduction to the English
Tourism Intelligence Partnership



INTELLIGENCE COUNTS!

Intelligence is vital for all of us: about visitors – what they do, where they go, how much they spend – and about the tourism economy – what businesses there are and where, how well they are doing, who's growing and who's facing challenges. Intelligence helps us understand what's going on, helps us make better decisions, helps us understand our product; England!

Did you know that.....?

In 2008 there were:

- 95.5 million domestic overnight trips in England, generating a total spend of £16.4bn.
- 27.3 million inbound visits, together accounting for £14.3bn in expenditure.
- England has over 50,000 accommodation establishments with enough bed spaces to accommodate 2 million guests.
- Holiday trips taken by UK residents in England in the first five months of 2009 are up by 15%. That amounts to 2 million more holiday trips and over 8 million extra nights' holiday taken than in the same period of 2008.

Good market intelligence is vital to all businesses, and never more so than when the economic climate is as tough as it is at present. But collecting, analysing, presenting and disseminating tourism statistics and intelligence which are timely, reliable, relevant, available at regional and sub-regional levels, and accessible to all is a particular challenge. One reason is the highly diverse nature of the tourism industry, with many small businesses. But getting information in this form is vital to inform decision-making and strategy, and to demonstrate the significant economic and social impact of the tourism sector.

The Partners for England Forum identified market intelligence as a particular priority for improvement.



THE ENGLISH TOURISM INTELLIGENCE PARTNERSHIP

Who we are and what we do

The English Tourism Intelligence Partnership (ETIP) was created by the Partners for England Forum at the beginning of 2008 to lead action and investment, to improve tourism intelligence and statistics within England, and to provide better evidential support for tourism investment and strategy development. ETIP fulfils this remit through:

A

Setting the agenda for the newly formed ETIP-funded Tourism Intelligence Unit.

B

Working with VisitEngland and the Regional bodies to develop their own statistics activities.

C

Commissioning studies for various purposes.

ETIP is jointly funded by the nine Regional Development Agencies (RDAs) and VisitEngland for three years up to 2011. It is chaired by David Quarmby (former Chair of the British Tourist Authority and of the English Tourist Board), and is led by a strong board of representatives from across the public and private sector (RDAs, VisitEngland, ONS, local government, the tourism industry and its trade associations, DCMS and academia). All those involved have knowledge, expertise and passion for tourism data and intelligence. ETIP is also advised by its Expert Reference Group – a group of eminent practitioners

and academics who bring immense experience of tourism statistics from the last 20 years and more.

The Tourism Intelligence Unit

To help ETIP deliver its priorities, the Tourism Intelligence Unit (TIU) has been established as a unit in the Office of National Statistics (ONS). For the first three years it is grant funded by ETIP, using a proportion of the resources made available to ETIP by the RDAs and VisitEngland. As well as delivering several workstreams in ETIP's business plan, the Unit is fast becoming a centre of expertise on tourism data and intelligence.

PRIORITIES

What matters to the user?

ETIP's first task was to commission The Tourism Company to find out exactly what the industry's needs and priorities were for tourism statistics and intelligence.

Where were the gaps? How important was it to break statistics down to sub-regions? How easily could people find and comprehend what was already available, and what use did they make of it already? How could it be improved?

The report, and ETIP's response can be found at www.etip.org.uk. This report has been fundamental in driving ETIP's priorities and the agenda for the TIU.

The responses from the various surveys, workshops and enquiries gave some clear messages about what needed to be done:



"Occupancy data is the weakest link – for both serviced and self catering. We need to understand what is happening in this area across all sizes of business, not just the big boys."

"The attractions in the area are very keen to access visitor numbers as this always influences the decisions of potential sponsors."

"We need signposting to where the data is available. Aware that a lot exists, but don't know where to find it."

"We need an organisation in place with the authority and responsibility for setting consistent methodologies and standards."

"There is a distinct gap in day visitor data."

"Supply-side data needs to be more inclusive."

"Tourism data tends to be so far out of date to be useless in active business planning."

"Accurate and timely statistics remain vital to the running of this important industry. We are currently operating largely in the dark which is dangerous!"

"We need common data standards and a clear appreciation of the limitations of the research - and plain English commentary and analysis."

"We would love to be able to use the data at the local level. Being able to disaggregate the data with confidence to this level – and across all regions for comparability - would have untold value!"

"The need for relevant and up to date data has increased as local authorities are now more performance driven and data is vital to assessing this performance."

"I am not sure what the economic impact of the tourism sector is in my district or how it compares to the performance of other areas."

Four user-driven priorities have been identified.

Considerable progress is being made on each of these priorities but there is much more work to be done if ETIP is to make a significant impact. The time is right to set out what has been achieved to date and to demonstrate what ETIP plans to achieve by 2011.



PRIORITY 1

Improvement in coverage and reliability of national statistics

Action:

- Improve supply-side statistics.
- Introduce new Day Visits survey.
- Improve Occupancy Survey.
- Develop Tourism Satellite Accounting (TSA).

Achievements:

- Pilot day visits survey field-tested in Autumn 2009.
- Tender process started for new occupancy survey.
- Supply side data is being analysed within ONS drawing on business survey data.
- A UK Tourism Satellite Account is under development and is moving towards publication.

By 2011:

- New occupancy and day visits surveys will be up and running.
- Regular production of 'supply side reports' from ONS on GVA, employment and turnover.
- Regular updating of the UK-TSA giving us a true picture of the value of tourism in the UK economy.

The visitor economy is very important to a rural area like Cornwall. In this area tourism can form a quarter of GDP and - depending on which definition is used - as much as 32% of jobs are tourism related. It is vital for this sector to understand how tourism works in the area, allowing businesses to transparently see how each is inextricably linked (accommodation providers, retailers, transport, restaurants and attractions) and how each relies on the performance of the other. The work of ETIP to improve reliability and timeliness of data that indicates how this sector of the economy is performing and making these accessible is so important. In the past this data has been slow to be released and has been hard to obtain. The improvements will raise the credibility of business decisions and help increase confidence in sustainability and value of this sector.

The Eden Project owes much of its success to the strength of the tourism infrastructure that surrounds the destination.

Without this the area would not be able to sustain the number of additional visitors that the Project has attracted throughout the year. Likewise, with insight that draws on strong primary data (collected at the attraction and through the wider tourism infrastructure) and the reliable secondary source data (e.g. UKTS, IPS, day visit, occupancy and supply side data) the attraction has been able to understand and communicate the strength of these relationships. Working in partnership with the wider industry, we can now demonstrate how more than 11 million Eden visitors in eight years have pulled in almost £1 billion of additional visitor spend into the local and regional economy.

Eden Project wholeheartedly endorse the work of ETIP and eagerly await improvements to the quality and speed of tourism data.

Andy Jasper,
Research Manager, Eden Project

PRIORITY 2

Guidance and tools for measuring tourism regionally, sub-regionally and locally

Action:

- Develop standard guidance, tools and best practice for local authorities, sub-regions and DMOs to measure tourism locally.
- Develop standard methods and models for assessing economic impact at local and sub-regional level.
- Clarify tourism definitions.

Achievements:

- Draft Guidance notes produced on tourism definitions, local economic impact modelling approaches, undertaking visitor surveys, benchmarking and indicators for tourism.
- Local Stakeholder Group set up to inform the process.
- Working towards a consistent methodology for assessing the economic impact of tourism.

By 2011:

- A consistent framework put in place to facilitate the collection and analysis of data on tourism at the regional, sub-regional and local levels.

Regional research and local intelligence is a key asset for creating targeted marketing campaigns, by capturing characteristics of visitors. It also ensures that all stakeholders – including businesses and local authorities – keep on top of the quality of the visitor experience. Good intelligence helps to justify expenditure in tourism service provision by the public sector, and (through economic modelling) reveals the economic impact of the visitor economy in terms of visitor spend and job creation. For example, Yorkshire Forward, Welcome to Yorkshire and six area tourism partnerships commissioned York-based QA Research Ltd and The Tourism Network Ltd to carry out a Regional Visitor Survey for Yorkshire. The results from over 10,000 surveys have just been published. The survey focusses on leisure visitors.

Gary Verity, Chief Executive of Welcome to Yorkshire, said:

"The results feed directly into our marketing campaigns allowing us to streamline and target specific audiences. This is both cost effective and ensures we give the public what they want rather than assuming we know what they want."

Research intelligence is useful in other ways. Racing in York is extremely popular, but York Racecourse now offers a wide range of conference, dining, exhibition and other specialist services in its grandstands. Research in 2007-8 showed that race goers contributed £39m to the local economy; meanwhile conference, exhibition and banqueting facilities brought in over £4m, making a £44m contribution to the York economy altogether. The economic impact of the racecourse is larger than expected, revealing the true value of this asset to the city.

Ian Tempest,
External Relations Manager, VisitYork

PRIORITY 3

Improved co-ordination of activity, data and methods

Action:

- Identify methodology and best practice for sharing between regions.
- Create mechanisms for coordination and data sharing.

Achievements:

- Regional Technical Committee that brings together researchers from the all English regions in place and working on the ETIP work programme.
- Local Stakeholder Group, involving local authorities and Destination Management Organisations, established and supporting the TIU on improvements to local measurement.
- A UK Tourism Satellite Account is under development and is moving towards publication.

By 2011:

- Regional co-ordination and working embedded through the Regional Technical Committee.
- A consistent approach to data collection and a common set of definitions and methods used at national, regional, sub-regional and local levels.

The big gap in tourism data for England is at the regional level and below.

The national surveys do provide some regional data but all too often the sample sizes are not big enough to make the data reliable, and they certainly prevent any meaningful analysis below the regional level. It is not that there is no data, but that there is no consistency in the approach that is taken, and so no comparability, either between similar places or between data collected at different spatial levels. Data isn't collected in a way that would allow comparisons to be made because there has been no real mechanism for coordination or leadership in this area, and no standards that people or organisations could sign up to. This is the gap that ETIP is now filling. There are international standards - the World Tourism Organisation has

published 'International Recommendations for Tourism Statistics, 2008', but the UK is not a member of the WTO and no organisation, until ETIP, has had an interest in taking these and translating them into a set of rules that can be used in England.

We need a single organisation that is clearly and widely recognised as having the authority and the responsibility to set standards for the collection of data, covering both methodology and data. If ETIP can fill this gap, it will have performed a great service to the sector and to the organisations like ours that work hard to promote and ensure its success.

Nick Brooks-Sykes,
Director of Tourism, Northwest Regional
Development Agency



PRIORITY 4

Improved communication about and access to statistics

Action:

- Help industry access statistics.
- Help industry use and interpret statistics, and understand quality and reliability issues.

Achievements:

- Improved regional UK Tourism Survey and International Passenger Survey reporting.
- Redevelopment of VisitBritain and VisitEngland websites currently underway.

By 2011:

VisitEngland website will be the principal portal for accessing a comprehensive range of tourism data and intelligence covering VE's own surveys and results, and signposting links to others' surveys and data, including Tourism Intelligence Unit outputs and guidance notes on ONS website.

The Caravan Club is a UK-wide membership organisation relying largely on its own intelligence, updated on a daily basis, for planning purposes. They would value easy access to accurate information about the caravanning sector as a whole, and longer term tourism trends.

It is essential for key data sources to be accessed via a portal on a central website. This repository of intelligence should be easy to find, simple and logical to use and updated regularly. It should be able to provide data at a national and regional level. If tourism businesses are made aware of this and use it regularly, they will encourage their staff to cooperate by providing timely and accurate information when surveyed. The perfect outcome

is a virtuous circle of useful intelligence provided by interested parties.

Results of the recent review show that there is very limited knowledge of current data sources and users simply do not have the time to search in any depth. Building awareness of one central source could provide quick benefits without incurring too much additional cost. This could be achieved by identifying a 'data champion' within each business, who could receive training (if necessary) as well as being the person to notify when new data is published to the website. This is a tactic that has worked well within my own organisation.

Brian Richardson,
Executive Secretary, The Caravan Club



LOOKING AHEAD

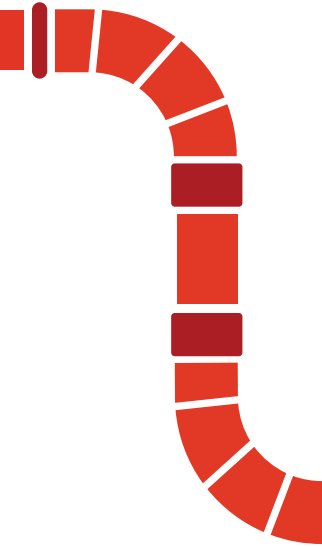
ETIP wants to see government and other agencies make a sustainable commitment to collecting and disseminating the tourism statistics that the tourism industry needs.

This will support better decisions and demonstrate the role of tourism in the wider economy. ETIP believes the best way to make this case is first, to show what can be done to deliver better value with what is available now, and second, to show what further value can be delivered with the results of ETIP's three-year programme of work.

ETIP has set out a three-year business plan, with identified improvements and deliverables to be adopted by the

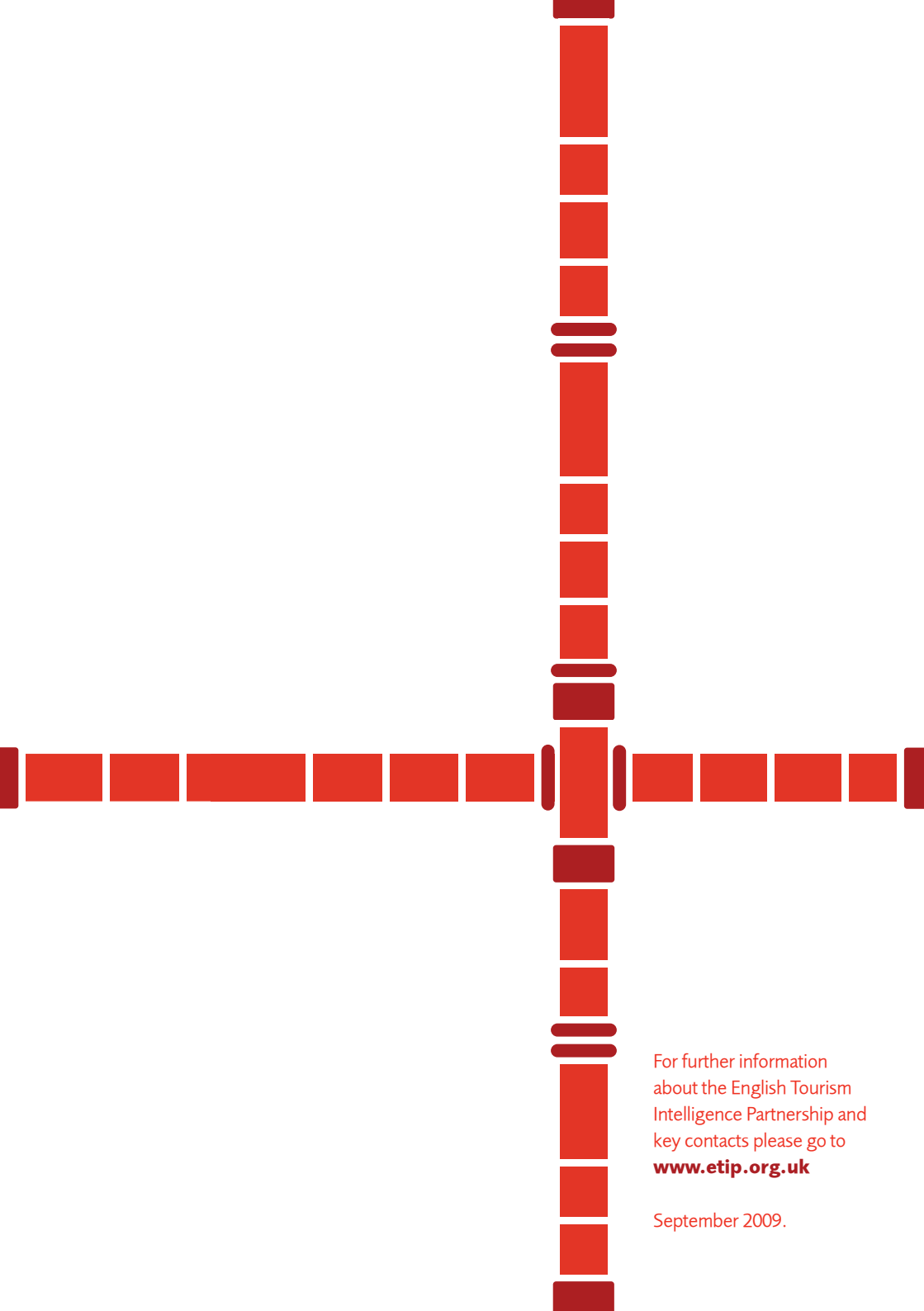
TIU, VisitEngland, the regions and many other agencies. Sustaining the leadership and vision beyond this three year period is crucial, to ensure the momentum that has been built is not lost. VisitEngland has decided that this role will form a key part of its strategy and business plans going forward.

For further information about the English Tourism Intelligence Partnership and key contacts please go to www.etip.org.uk



For background to the Partners for England Forum see www.partnersforengland.com





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