Visitor information review for South East England

Summary of Findings and Recommendations

June 2006

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Report prepared for Tourism South East by

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1 Introduction

Tourism South East (TSE) commissioned Tourism Enterprise and Management Ltd (TEAM) to undertake a review of the role of the Tourist Information Centre (TIC) service in the provision of visitor information within its region.

The stated mission of this study was:

To ensure that the South East of England is able to provide effective and high quality information to potential and actual customers:

- *At the right time*
- *In the right format*
- *Across the entire decision-making and visiting cycle*
- *Whilst meeting the need of businesses in the region and maximising the generation of business.*

It was agreed that the main focus of the review would be on the provision of Tourist Information Centres (TICs) and specifically the provision of a face to face counter service.

The review has included:

1. An audit of current TIC provision based on data from EnTICe and questionnaires distributed to TICs in January 2006
2. Workshops with TIC staff at the regional conference in December 2005 and extensive consultations with TIC managers, Tourism Officers, and other key players
3. An assessment of changes in consumer behaviour of relevance to TIC services and operations
4. A review of the regional and national perspectives.

This paper summarises the key findings from the research and provides details of a recommended approach. The full report includes further details on the findings and more thinking behind the recommendations. [Detailed working papers on the above elements are also available.]

This paper outlines the priorities for a future TIC strategy and makes recommendations for implementation at regional, sub-regional and TIC level. The content has been developed in the light of the Strategic Review findings and tested through further stakeholder workshops and discussions. The focus of the review is on the element of TIC operation that is unique, which is the customer-facing role of direct counter services.

2 Summary of key findings

Key findings of the data analysis undertaken for this review that are of particular importance in shaping recommendations for the way forward, are briefly presented below:

- The region's TICs receive some 7 million visitors a year and handle 6.52 million direct enquiries, but 32% of those enquiries are handled by just 4 TICs, and 64% are handled by 14 TICs.
- The average net cost of running a TIC in the region is £77,000 per year, and this amount is funded by individual local authorities. The net cost of the entire South East provision of TICs is in the order of £6.4million per year
- The average cost of servicing an enquiry is £1.15, but the cost varies from £0.07 to as much as £7.47 in the least efficient TIC.

These statistics hide an enormous disparity between the TICs in the region, both in terms of the types of enquiries that they handle and the services they provide. These differences largely relate to the particular destinations that they serve and the nature and number of visitors in that destination. For some TICs, the name of 'Tourist' Information Centre is actually a misnomer, as the majority of their work is directed at providing services for their local community and tourists are an almost insignificant part of their work.

To date, the only form of measurement of the economic impact of TICs has been in quantifying their accommodation bookings. With the increased use of the Internet this aspect of the TIC work has declined, even in those destinations that service large number of visitors. The data from the audit indicated that 38,600 bed nights were booked by TICs in 2005, at a value of £2.2million – which equates to around a third of the cost of providing the network. Much of this business might have come to the region anyway, booking via other channels.

As a result of local authority budget pressure (and the fact that TICs are not a statutory service), seven TICs have closed recently and more are under threat. TICs have become the 'poor relation' of DMO/Local Authority tourism activity as new media has become more prominent, and there would appear to be little engagement from the local authority budget holders in the fate of their TICs. TIC staff are committed to their work, but the lack of any national or regional funding support over recent years has diminished the sense of a regional network and further weakened their position.

TICs in other regions of the UK are facing a similar situation, although it is more acute in the South East as TICs historically were in two distinct networks before the amalgamation of the two previous RTBs. TSE is the largest operator of TICs in England, with eleven centres under its direct management, but several of the TSE managed centres have closed during the last year.

VisitBritain has recognised the potential for TICs to contribute to the 'Customer Journey' (see appendix 2) at the planning stage and within the destination and wishes to engage the regions in working with TICs to greater effect. Research by VisitBritain indicates that between 10 and 20% of visitors will wish to use TICs or in-person information sources while in Britain – the vast majority of these visitors will be in London and the South East. However, the reality is that, as VisitBritain and the regions are not providing major funding support to TICs, they will rely on the local authorities to respond.

There is some frustration about the lack of a TIC at Gatwick airport which is seen as a major gateway to the region (the TIC closed there in 1995). In reality, around 80% of Gatwick passengers are 'outbound' (i.e. domestic visitors travelling abroad). Of those that are arriving in the UK, the majority are headed straight to London. There are also difficulties in making a TIC commercially sustainable given that there are commercial operators offering car hire, hotel bookings and transport information and no single location in an airport that will be accessible to all visitors. There have been extensive discussions and negotiations over recent years, but the staffing costs to cover the hours that would be required would seem to be prohibitive at the present time. A joint approach with VisitLondon might be considered.

Motorway service stations are perceived to be an important point for visitors seeking information, but in reality the TICs that have opened at service stations have closed after a few years (Clacket Lane on the M25 and Cherwell on the M40 for example). Restrictions on goods and services that they can offer mean they have been unable to be operated in an economically sustainable way. The lack of correlation between the location of the TIC and the destination that visitors are planning to visit also makes support funding problematic; travellers typically stop for a break two hours before they reach their destination and it can be difficult for the TIC to play a visible role for local tourism businesses.

Conclusion

The position of TICs in the South East of England is clearly at a watershed. If the regional board does nothing, then it is likely that:

- more TICs will close, including some of regional importance
- many of those that remain will become increasingly divorced from local and regional marketing activity
- visitors to the South East will lose opportunities for face to face contact
- there will be a reduction in numbers of telephone and email enquiries from potential visitors that will be serviced
- the potential benefits offered by direct contact with some 5 million visitors to the region will not be realised.

The key principles and recommendations outlined below take account of the varying roles of TICs in different locations and identify how the TIC network can contribute effectively to a strong regional visitor economy. Some radically different approaches will need to be adopted by both TSE and its partners if this contribution is to be realised.

3 Mission and Strategic Aims for the TIC Network

The **mission** of the TIC network in the South East should be:

Mission

- To provide an effective and efficient information service, valued by all customers.
- To maximise the value of tourism to the region by contributing to increased visitor levels, increased visitor satisfaction and spend.

A number of more specific **aims** for the successful and sustainable operation of the regional network of TICs have been identified as follows:

Strategic aims

- To provide added value information tailored to the needs of customers
- To provide support to other elements of destination marketing work
- To maximise for the South East the potential value of tourist traffic coming through the main gateways
- To increase visitor satisfaction through the highest standards of customer care
- To increase visitor spend
- To provide a mechanism for business liaison
- To position TICs at the heart of their community

4 Recommendations

Outlined below are key recommendations intended to shape the future strategy for TIC provision in the region.

4.1 Defining clear roles for different types of TIC

TICs vary widely in their operations according to their location and position within the region and the rationale for their existence. There is therefore no single common approach that will work for all TICs, and it is a mistake to attempt to justify the existence of certain TICs against the single criterion of measurable economic benefit from visitors. Accommodation bookings, for example, are likely to be only a small part of the work handled by staff and so this is not an accurate measurement of performance in isolation.

Each type of TIC needs to focus on those services which will contribute to its long terms political and economic sustainability. In some cases, these will be services for local residents rather than for visitors.

For simplicity, we have defined three categories of TIC:

- Strategic
- Destination
- Community.

A summary of the key features of each of these categories is set out on the next page.

Definitions and roles will need to be indicative, not prescriptive. However, for the purposes of this work, we have defined the region's TICs by a set of criteria based on numbers of enquiries, proportion of visitor use (as opposed to local residents) and the nature of their destination. The initial draft categorisations of all the region's TICs are contained in Appendix 1. Having identified the role that is needed of a TIC in a particular location, TSE will be able to support that TIC in fulfilling that role through the range of business options described in section 5.

Regardless of their category, all TICs should:

- Be managed cost-effectively, taking advantage of available commercial opportunities
- Be located in accessible and visible locations, compliant with the DDA
- Have trained staff with high levels of customer service skills.

These categorisations will provide the basis for TSE supporting the destination in developing the most appropriate business models for the sustainable provision of visitor information. Further principles for the business models for different types of TICs are outlined below and in Section 5.

Strategic TICs

Strategic TICs are those that are located in key gateways and prime tourist destinations – (or 'hooks' as defined in TSE's regional marketing plan). They typically handle over 100,000 counter enquiries a year and have a high proportion of staying visitors using their service. They also have a high proportion of overseas visitors who may be seeking information on other parts of the UK. They have a major role to play in presenting both the region and the country to visitors. They should:

- Offer a wide range of visitor services
- Have highly trained staff (with language skills)
- Have appropriate IT support
- Be sited in a location with high visitor visibility
- Maximise sales of accommodation, packages, tickets and other commercial opportunities
- Be integrated into destination and regional marketing campaigns, focusing on priority segments

Destination TICs

These TICs are located in secondary but important visitor destinations and have significant levels of visitor activity. They would typically handle between 30,000 and 100,000 counter enquiries, with roughly equal proportions from staying, day visitors and local residents.

They should:

- Offer a range of visitor and community services
- Support local tourism businesses
- Support civic pride and provide a 'sense of place'
- Facilitate and promote local events, arts and cultural opportunities
- Be managed cost-effectively possibly as part of a shared premises or operation with a relevant organisation.

Community TICs

These TICs may be found in either rural areas with low levels of activity or in non-tourist urban locations. They would have a high level of usage by their local community, and a low level of usage by staying or day visitors.

They should:

- Offer services useful to the local population
- Provide information to visitors and a contact point for local tourism businesses
- Support local events, arts and culture
- Be managed cost-effectively, probably as part of a joint operation with other services or operators

4.2 Alternative delivery models

For TIC services to be sustainable, they need to be open to alternative delivery models which can increase the efficiency of the service provision. Whilst some level of ongoing financial commitment will be necessary there are opportunities to make overall budget savings whilst still providing a high quality information service for visitors.

Whilst acknowledging that the Strategic TICs are those which have the greatest impact on the regional and national visitor economy, the Destination and Community TICs can be very important in supporting local visitor economies and communities. TSE will need to be in a position to provide guidance to these TICs when their position and budgets come under scrutiny.

A group of TICs has agreed to be 'pilots' in implementing one or more of the alternative business models outlined below. This will provide TSE and relevant TICs with robust data and experience which can be shared for future changes in business models.

4.3 Defining a clear role for TSE

The precise work programme of Tourism South East will be dependent partly on the final outcome VisitBritain's review and action plan for tourist information, and partly on the funding sources that are available to it. It is very probable however, that TSE will be required to **undertake the management of the regional network franchise on behalf of VisitBritain**, within a contract to be agreed.

As part of this management role, TSE will need to continue to provide:

- **Quality control of TIC operations**
- **Support, training and communication for the network.**

In addition, TSE should give added emphasis to some of its current operations. For example, it will need to:

- **Provide political support for TICs locally and regionally** – but more pro-actively with a clear programme of leadership, promotion and support including new business model advice and supporting the TICs in gaining political capital locally
- **Promote the TICs within its regional marketing activity.** Both online and printed media should highlight the benefits of using the TIC counter service, detailing the services available and the impartial expertise that TICs offer. 'Text a question' services could feature within this promotion
- **Research information use by its identified target markets.** Specific research amongst the Ark 'panels' of identified segments will provide insights into the role that TICs can play in developing strong customer relationships with these potential visitors, based on their patterns of trip research and booking
- **Provide opportunities for networking.** TIC staff and TIC operators need to meet with colleagues who are managing similar operations, so that they can share expertise. One way of doing this may be to group TICs together by their category and to have meetings dealing with specific new business models. Regional marketing campaigns will be an important element of these meetings

- **Provide training for business planning, data management, IT, and retail**. Where possible training should be provided on-site where it can be directly applicable to the needs of a specific TIC. Off-site training is difficult to manage within tight TIC rotas, and is not always immediately relevant for individual staff
- **Manage the TIC awards programme and sharing of best practice**. The regional awards for TICs are popular with TIC staff and budget holders, but they could be used to greater effect as an opportunity to share examples of best practice, and identify bad practice that can be improved. It may be appropriate to have new awards for each of the three categories – strategic, destination and community.

The following new areas of activity will be required:

- **Offer leadership and expertise through specialist staff for commercial opportunities, retail and operational management.** TSE needs to become recognised as the source of all knowledge and expertise relating to TICs, employing staff or freelance experts who have the very practical skills that are needed in a modern TIC network – specifically development of commercial opportunities, enhanced retail skills, IT and data management and effective management operations
- **Provide advice and guidance on alternative delivery models, through the development of operational 'pilots'.** The TICs themselves can be an excellent source of expertise and experience, based on their specific approaches, but these need to be encouraged, managed and monitored by TSE so that they will be successful and provide learning opportunities for other centres
- **Develop the management of those TICs which are operated by TSE as examples of good and cost efficient practice.** Many of the TICs that have been managed by TSE fall within the Community category of TICs and possibly because they had been outsourced to TSE, they were a relatively easy target for budget cuts. There is also a likelihood that they were less well integrated into their local community and so did not have political or local resident support. It is also likely that they were largely in locations where a dedicated TIC will not be sustainable, and where an alternative business model as described above would be desirable. TSE is in a unique position to lead the way in taking a fresh approach to its own TIC operations.
- **Develop a template for negotiation with commercial operators to fill gaps in information provision in identified locations.** Where a TIC cannot be sustainable, simple agreements with retail or other operators to provide a straightforward counter service to an agreed brief will be required. This might include gateways such as Gatwick Airport where existing information services can incorporate visitor information with relatively minimal additional development and certain High Street locations where a TIC is lacking**.**
- **Work towards the integration of TICs within marketing activity, including Customer Relationship Management** (see section 7.3). Face to face contact with some 5 million visitors, or 'customers' each year would be a crucial element of any business operation. The TICs provide an opportunity to learn more about these visitors, their profile, visitor patterns and booking habits and to influence them to make repeat visits to the region. They can play a key role in customer data collection, e-marketing and segment-led campaigns.
- **Develop methods for the measurement of the economic and social impact of TICs.** The Strategic TICs are a potential source of influence for visitors across the region and the rest of the UK. Destination and Community TICs can also be important as supporters of their local economies and social and cultural products. Specific research, which acknowledges the differences between TICs but which

measures the different impacts that they have will be necessary to give the TICs political 'muscle' in a demanding cost-cutting environment.

- **Provide a series of toolkits for business planning**. TSE is in a unique position to provide each TIC with the tools that it needs to assist in its own survival and development, through expertise in operations and new opportunities.
- **Support the development of telephone contact provision on a regional or sub-regional basis.** There is a strong argument for TSE to take on or to facilitate the handling of telephone enquiries at the regional or sub-regional level, thus freeing TIC staff to handle counter enquiries. Managing this provision through one or more of the Strategic TICs may be a good option. Forging partnerships with telecommunication companies would play a key part in this.

Apart from supporting the provision of face-to-face counter services via the TICs, TSE will have a key role in ensuring regional coverage for 'non-counter' information services, including telephone, e-mail, text and the data collection that provides the background resource for all of the above.

4.4 Integrating TICs within destination marketing

The links between TICs and destination marketing functions within the region need to be formal and explicit. TICs represent a primary interface between public agencies and their customers and should thus be regarded as an integral part of the marketing process – for example by:

- Creating a well researched customer database that facilitates implementation of Customer Relationship Marketing, developed by compiling information at every point of customer contact
- Counter and telephone services helping marketing campaigns through brochure fulfilment / conversion of bookings and offering a fully professional and knowledgeable service
- Selling a range of distinctive and dynamic short break packages developed within and around the region
- Providing a 'shop window' for the destination on arrival, with opportunities for visitors to 'buy' other elements of the product, such as tickets for theatre, attractions, excursions or events.

South Warwickshire, for example, integrated its TICs into destination marketing with a clear focus on increasing retail, ticket and accommodation sales and generated 55% growth in sales revenue in the first year, largely through cross selling and giving staff revenue targets and incentives.

4.5 Enquiry handling and the Tourist Information "brand promise"

TICs need to differentiate themselves from other available information sources by concentrating on those elements at which they excel and which consumers are seeking.

The key elements of the brand promise would be:

- Face to face interaction, with staff highly skilled and trained in customer service
- Accuracy, quality and depth of information
- Impartial advice and reassurance

- Promotion of quality assured accommodation and facilities.

TICs, DMOs and TSE need to emphasise these aspects of TIC provision within their promotional activities and build them into job descriptions and data systems to ensure that the 'promise' is kept.

Additional elements of this promise should include the physical branding, quality and ambience of the TICs, common systems and consistent service delivery, and a strong sense of welcome for visitors in all centres.

The national 'mystery shopping' scheme of telephone and email service, together with 'in person' visits co-ordinated by TSE will be key in maintaining these standards. The policy of booking only into quality assured accommodation is dependent on local council decisions, but it is likely to be a criterion of the new VisitBritain standards for TIC operation, without which the national branding will not be authorised.
User satisfaction surveys as introduced by DPUK can be another useful source of monitoring levels of visitor satisfaction.

4.6 Capacity and skill building

Linked to 4.5 above, there is a clear need to constantly improve expertise and experience amongst the region's TICs in order to deliver improved visitor services, where the expectations of both customers and funding organisations are increasingly high. Skills that require particular development are:

- Business planning – skills in assessing effectiveness and improving efficiency of operations
- Customer contact services – maximising the opportunities of 'up-selling' destination and regional experiences, both via telephone and counter services. Winchester is a good example of this type of operation
- Marketing and CRM – integrating TICs into destination and regional marketing activity, particularly in capturing data for future promotional opportunities and the use of IT for e-marketing. South Warwickshire is an example of good use of IT and Brighton works closely with the conference desk on accommodation bookings.
- Achieving excellence in fulfilling customer needs – 'Welcome Host' is the first line in customer service, but this needs to be developed with skills in sales based on understanding customer needs
- Retail and commercial services – Most TICs in the region have a retail operation within the TIC, and some offer ticket sales for attractions, events, tours and transport while a few offer 'Bureau de Change' facilities. These are not typically areas where the public sector excels, and therefore on-site training from retail or commercial experts can help to maximise revenue. Lyndhurst and Lymington are examples of a new commercial approach where the target is to have the TICs covering their own costs. Hastings offers a range of services for both local people and visitors which help to support extended opening hours.
- Maximising the benefits of major events in the region – The South East is host to some the largest events in the UK (Brighton Festival, Glyndebourne, Ascot, Henley Regatta etc) Although tickets for these events are not usually available to be sold through TICs, there are opportunities for promoting longer breaks in the region around these events. Selling tickets for other events is a useful source of income for TICs where commission is payable.

Many of these improvements can be best coordinated via TSE, but individual local authorities or managing organisations will also need to utilise their own training and recruitment policies to achieve an upgrading of skills within TICs.
A series of schemes and pilots in selected TICs are recommended which will develop expertise and experience in these fields. This 'databank' of expertise can then be shared across the region.

4.7 TICs in the right place, open at the right times

The most significant aspect of a TIC is its location in relation to visitor flows. This has major impact on visitor numbers and usefulness of the centre as a hub for visitors.

Where possible, Strategic and Destination TICs need to be positioned where there is greatest concentration of visitors, with sufficient space for access to staff, retail and general information.

The priority for Community TICs will be that they are accessible to local residents as well as being well sign posted and visible for visitors.

Opening hours need to be geared to customer demand and not restricted to standard office hours with closures at weekends.

All TICs will need to review their location and opening hours within the context of these requirements and consider options for relocation, co-location or an alternative delivery model if necessary (see section 5)

4.8 Industry support

For small and medium-sized businesses in the tourism and hospitality sector, the TIC is frequently a reference point and source of advice as well as being a direct source of bookings and providing opportunities for promotion. Many accommodation operators see the TIC as "the Tourist Board" and they gain support from the personal contact that a TIC offers. TIC services need to be geared to meeting the needs of local SMEs to ensure that they are valued and have 'political capital' within their local area.

This requires that TICs are proactive in their dealings with the industry through regular mailings, hosting presentations or open evenings and responding promptly and professionally to requests from tourism businesses for advice or information.

5 Alternative delivery models

The following two sections present a number of alternative delivery models which TSE can utilise when called on to advise TICs facing budget cuts or closure, or seeking to improve efficiency and visitor numbers. Tool kits and case studies are being developed for each of the models described below via the series of pilot projects.

The first six models (Part 1) are already in existence or in a developmental stage within the region. These could be replicated elsewhere. The following three models (Part 2) are new ideas which require testing and piloting and where TSE will be taking on a role of innovation and leadership.

The tables summarise the <u>potential</u> advantages and disadvantages of each model, although each case will vary according to specific circumstances.

Part 1 – Models already operational or under development

1. Relocation

The TIC may be moved to different premises in a better location, where it will have an opportunity for higher visibility for visitors and increased footfall. This provides the opportunity for higher returns from commercial services and retail although it may incur increased cost of premises. Most importantly it offers the opportunity to influence a higher number of visitors through face to face contact.

Advantages	Disadvantages
➢ Improved location ➢ Increased footfall ➢ Enhanced retail opportunities ➢ Improved commercial opportunities	➢ Increased premises cost ➢ Increased staffing

This could be considered by strategic or destination TICs which are currently poorly located away from visitor routes. An example of relocation that has achieved significant improvements in operations is Canterbury and similar relocation is planned for Brighton and Whitstable amongst others. Windsor TIC has recently relocated to smaller premises in a strong retail area where it intends to focus on non-retail services.

2. Co-location

The TIC may consider co-locating to a visitor attraction, museum or retail centre with higher or potentially higher visitor numbers. The new premises may be smaller but would offer opportunities for shared staff costs and increased footfall.

Advantages	Disadvantages
➢ Improved location ➢ Increased footfall ➢ Develop broader user profile ➢ Shared staff costs ➢ Extended opening hours	➢ Possible space restriction ➢ Potential loss of identity

Examples of this arrangement are Woodstock and Arundel. Bicester is an example of being located within a dedicated retail area and benefiting from high footfall as a result.

3. Provision of visitor information through a shared council service.

This model builds on the concept of the Community TIC and involves the development of joint operations with other Local Authority services (e.g. libraries, council reception areas, leisure centres etc). Premises, staff and overheads are shared.

Advantages	Disadvantages
➢ Shared operating costs ➢ New user profile ➢ Enhanced community role ➢ More political support ➢ Service is retained	➢ Possible space restriction ➢ Potential loss of identity ➢ Less likely to meet strategic aims ➢ Lack of visitor orientation ➢ Reduced quality of service ➢ Potentially inappropriate environment for visitors ➢ Non-tourism management ➢ Limited commercial opportunities/culture

This model would apply primarily to Community TICs and has been applied in Hastings, Marlow and Wycombe. An unusual example is Tameside TIC (in Greater Manchester) which offers a travel booking service for council staff and other public sector authorities and has a turnover of £400,000 p.a. This is not of any relevance to the local visitor economy however, as it deals in bookings for other parts of the UK and has a minimal local destination role.

4. Sub-letting premises

Where the TIC is in a good location, but facing funding pressures it may be appropriate to sub-let or lease part of its space to another operator – ideally one with synergy to a TIC operation like a café, ticket agency or book shop – as a means of generating both additional income and increased footfall.

Advantages	Disadvantages
➢ Increased footfall ➢ New, regular income stream ➢ Enhanced retail opportunities ➢ Broader user profile ➢ Longer dwell time ➢ Increased staff cover	➢ Possible space restriction ➢ Potential loss of identity

Sub-letting TIC premises to another operator could be an option for all categories of TIC. Current examples of this include Canterbury, Rochester and Oxford. The Britain and London Visitor Centre at Piccadilly sublets to a ticket agency, hotel booking service and a Bureau de Change.

5. Contracting out the information service to a third party supplier.

This involves an existing TIC service being delivered by another organisation, either with new or existing staff.

This approach offers potential economies of scale, opportunities for increased commercialisation, and a more efficient service where the operator is managing several TICs. The funding organisation would still have a significant financial commitment but there would be significant savings as a result of reductions in overhead charges and more flexible arrangements for pay and conditions.

Advantages	Disadvantages
➢ Retention of service in the locality ➢ Reduction in overhead charges ➢ Independent cost centre ➢ Economies of scale ➢ Access to expertise and specialist staff ➢ Freedom to operate more quickly in response to commercial opportunities	➢ Potentially less responsive to local community ➢ Lack of long term commitment to destination

This is a potential option for all TICs. TSE's own operation, running eleven TICs on a contract basis, is a well-established example of this model. Another example relates to the TICs in Shepway, where Carrier Direct provides the service under contract to the Local Authority. Sub-regional arrangements would be likely to be most effective.

Part 2 – New models

6. Facilitating information provision via a franchise, Service Level Agreement or commercial partnership

This arrangement would be appropriate where there is a need for alternative TIC provision either because of an actual or impending closure or to improve visitor services at a particular site such as at a key visitor location, retail centre or attraction. It may also be judged desirable in areas where there are few TICs at present as a result of limited local authority engagement in tourism (in Surrey for example, where only Guildford remains open). This may also be a viable option at Airports and Service Stations in and around the region.

The provider of the service would need to meet certain criteria in terms of location, opening hours, staff training and provision of display and information materials. In return they would be permitted to use the recognised '***i***' symbol and have appropriate sign-posting. The financial arrangement would be negotiated according to circumstances, but would certainly offer the opportunity to have an information service provided at significantly lower cost than for an independent TIC.

It may be that a retail, pub or café chain would be interested in operating such a franchise arrangement over a wide geographical area. TSE is actively negotiating with a suitable High Street supplier. TSE and VisitBritain will ideally need to work together to broker a national arrangement.

Advantages	Disadvantages
➢ Reduced operating cost ➢ Increased footfall for operator ➢ New promotional outlet for attractions and tourism businesses ➢ Broader user profile ➢ Supports high street economy	➢ Possible space restriction ➢ Potential loss of identity ➢ Loss of information focus ➢ Inconsistent staffing

This is more likely to be an option for Destination TICs but may also apply to Community TICs or to 'Prime' regional destinations where there is more than one focal point for visitors. In this case the existing TIC would work in close partnership with the alternative information supplier. In the case of airports and motorway service stations this type of service could be provided through existing commercial outlets.

Bristol operate 4 'information desks' within other operations within the city, through various organisations. This provides information for visitors in good locations, but does lose some of the sense of identity of a TIC service.

7. Partnership supply of visitor information services between neighbouring areas

This arrangement would enable neighbouring local authorities to share certain elements such as call handling and email responses between a group of TICs and also share expertise in IT, retail, and management between centres. This would enable the centres to run more efficiently and provide a more professional service with higher levels of expertise. . A related option would be for two TICs in close proximity and with similar visitor patterns to co-locate into one set of premises to achieve savings and synergies.

Advantages	Disadvantages
➢ Reduced operating costs ➢ Economies of scale ➢ Enhanced retail opportunities ➢ Support joint marketing approach	➢ Potential loss of identity ➢ Potentially less responsive to local community

This model could apply to all TICs where there is proximity and visitor profile similarity. It is about to be applied by the Heart of Kent authorities, and is being considered by Marlow and Henley.

8. Creation of a "Company" to run Tourist Information Centres.

This delivery method would involve the creation of a new company, perhaps by TSE, to run groups of TICs on a local area or sub-regional basis. This could result in significant cost savings achieved through well trained but flexible staff, the introduction of specialist skills and the ability to benefit from joint purchasing. There could be improved customer satisfaction through extended opening hours, a proactive CRM approach and a strong destination marketing approach.

Advantages	Disadvantages
➢ Reduced costs per TIC ➢ Economies of scale ➢ Higher profile ➢ Increased commercial opportunities ➢ Specialist management expertise and skills ➢ More effective marketing role ➢ Improved networking ➢ Common systems and procedures, with full benefits of e-business applications	➢ Financial risk ➢ Perceived loss of control by local authorities ➢ Potentially less responsive to local community ➢ Easier target for budget cuts

This concept has yet to be applied elsewhere in the UK although proposals for such a company are being progressed in Cumbria. It could apply to a sub-regional area or other area that has similar visitor profiles and destinations.

TIC Closure

In the event that a TIC is facing closure and there is no opportunity that it can be kept open more effectively, there are certain requirements which will still be the responsibility of the funding body and which will need to be addressed.

1. Telephone enquiries. Calls to the TIC number will need to be re-directed, either to another council department (in which case training will need to be provided) or to a neighbouring TIC, for which a charge might be made.
2. Data collection. There will be a responsibility to collate data on accommodation operators, attractions, local events for local, regional and national websites, guide books and reference sources. Neighbouring TICs or TSE could undertake this service on a paid for basis.

6 The next steps

The new approach to Visitor Information Services as outlined above will require close cooperation between TSE and the TIC managing organisations. TSE would ideally utilise the TICs that fall within its own management as 'early adopters' of the new approach.

Below are the specific actions required of both parties. Following agreement in principle to this approach, a detailed implementation programme will be required:

TIC Managing Organisations

- To consider the categorisation of their TIC and assess their operations within that context.
- To review their TIC operations in the light of the recommendations above
- To consider alternative delivery model opportunities where financial pressures are likely to arise
- To consider participation in new business 'pilots'
- To share positive and negative experiences of specific operating approaches where they can be useful for other TICs

TSE

- To present the new approach to the TIC network to the key players, including funding organisations
- To reallocate TSE Information Services staffing and budgets in order to undertake the new programme
- To manage and monitor the development of the pilot projects in each of the categories outlined above
- To develop a database of expertise and experience in TIC business planning and alternative delivery methods, both within the region and nationally with VisitBritain
- To initiate discussions with potential commercial partners for delivery of information services
- To prepare, with TEAM, a detailed action plan for implementation for the next twelve months

Appendix 1 South East Tourist Information Centre Categorisation

Strategic	Destination	Community Indicates TIC has now closed
Brighton	Arundel	Abingdon
Canterbury	Banbury	Aldershot
Chichester	Battle	Alton
Dover	Bicester	Andover
Eastbourne	Bognor Regis	Ashford
Hastings	Burford	Aylesbury
Lyndhurst	Cowes	Basingstoke
Oxford	Folkestone	Bexhill
Portsmouth	Guildford	Bracknell
Ryde	Henley on Thames	Broadstairs
Winchester	Herne Bay	Buckingham
Windsor	Lewes	Burford
Rochester	Littlehampton	Burgess Hill
	Lymington	Chieveley Services
	Margate	Crawley
	Marlow	Deal
	Newport	Didcot
	Ramsgate	Fareham
	Royal Tunbridge Wells	Faringdon
	Rye	Farnham
	Sandown	Faversham
	Shanklin	Fleet
	Southampton	Fordingbridge
	Whitstable	Gosport
	Woodstock	Gravesend
	Yarmouth	Havant
	Worthing	Hayling Island
		High Wycombe
		Horsham
		Hythe
		Maidenhead
		Maidstone
		Midhurst
		New Romney
		Newbury
		Petersfield
		Petworth
		Reading
		Ringwood
		Romsey
		Rownhams
		Sandwich
		Seaford
		Sevenoaks
		Tenterden
		Thame
		Tonbridge
		Ventnor
		Wallingford
		Wantage
		Wendover
		Witney

Appendix 2 The Customer Journey

The "customer journey" concept describes the different stages that a visitor will go through in planning, booking and taking their trip. Information requirements and sources will vary in the different stages, however this helps to identify ways that TICs can have an influence on how visitors interact with a destination at different stages.

The following table identifies the **main** information requirements and sources at five stages of the journey. It should be noted that these stages are generalisations – for some visitors there may be more stages, and for some less stages.

Customer Journey	Information Requirements	Primary Information Sources
LOOK	Ideas and inspiration that suit lifestyle and the occasion Destination options The broad picture of an area	Own knowledge – internal references Word of Mouth (WoM) – friends / relatives Media – editorial giving more weight than advertising Travel agents (particularly for overseas holidays)
BOOK	What to do there? The main activities Wet weather facilities (families) Time specific information (e.g . events) Travel time and method; itinerary Accommodation Costs Specific activity related info (special interest segments)	WoM Internet Brochures (collected from a range of sources – internet, TB, TIC, travel agent, advert) Travel Guides – more so in overseas markets Specialist sources
TRAVEL	Travel and some or all accommodation advance booked Car hire (possibly booked at destination) Activities (more likely to be booked at destination)	Telephone direct Internet Customer Contact Centre Travel agent
STAY	Places to visit Places to eat Events Shopping Transport and travel information Local services Accommodation	TICs Brochures taken on trip /printed from internet Leaflets picked at destination Concierges/Local people / businesses Travel guides Signs & TIPs Web at destination Mobile devices
KEEP IN TOUCH	Information that might make a repeat visit attractive e.g.: Offers Events New facilities	E-newsletters Direct mail Brochures Editorial Adverts

Information requirements and sources will vary according to a range of factors including length of holiday, familiarity with a destination, perceived level of risk around the trip, and psychographic characteristics.