

Tourism Research Strategy

2006 – 2009



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1. Background

The Northwest Regional Development Agency (NWDA) is responsible for the sustainable economic development and regeneration of England's Northwest. The work of the Agency is driven by the Regional Economic Strategy (RES) which is a rolling 20 year strategy to shape the future economic direction of the region.

Tourism is a significant sector within the regional economy with over £7 billion spent annually by tourists on a range of goods and services across the region. Within the RES, action number 10 is to: *Develop growth and innovation in the tourism sector through the continued implementation of the Regional Tourism Strategy.*

The Regional Tourism Strategy (RTS) serves to guide the continued growth and success of the tourism industry and a key requirement is the development of *a high-quality evidence base for all decisions about tourism investment and from which to measure performance.* It is this requirement that forms the basis for our Tourism Research Strategy.

2. Introduction

Throughout the industry (both public and private sector), we are facing increasing demands and expectations to provide robust evidence for monitoring performance and to support planning, policy and funding decisions. The development of a high quality evidence base is essential to enable us to:

- Demonstrate to Central Government, the importance of tourism within the wider economy, thereby helping to secure funding for the region.
- Monitor trends in demand (e.g. by month/year/area/sector) in order to guide regional and sub-regional investment/intervention decisions.
- Measure the impact of public sector investment/intervention and of shocks/major incidents.
- Improve the performance of the region's tourism businesses through the provision of high quality industry intelligence that can support their business development decisions.

The purpose of this Tourism Research Strategy is to set out a programme of research for 2006 – 2009, that will address the above requirements, thereby contributing to the successful growth of the tourism sector and the wider economy as outlined in the RTS and the RES. The Strategy follows four broad headings:

- National Surveys
- Regional Research
- Publication/Dissemination of Data
- Taking the Strategy Forward

3. National Surveys

National tourism surveys have come under heavy criticism in recent years. The Denis Allnut "Review of Tourism Statistics", undertaken on behalf of DCMS in 2004, highlighted major weaknesses in methodologies and outputs for all of the key national surveys: The United Kingdom Tourism Survey, International Passenger Survey, Leisure Day Visits Survey, United Kingdom Occupancy Survey and the Survey of Visits to Visitor Attractions. As a result of this review, many regions including the Northwest, have looked to alternative sources of regional tourism intelligence.

Whilst there are a number of benefits of a regional approach such as flexibility and richness of detail, we should not lose sight of the value of national surveys which can:

- provide essential contextual information;
- enable comparisons between regions;
- ensure consistency of survey methodology and outputs;
- achieve large scale samples that would be beyond regional budgets.

The scenario we should be aiming for is one where national surveys are improved to the extent that they are able to provide a sound, reliable "backbone" of tourism intelligence, which can then be supported, strengthened and augmented by a programme of regional research. Over the next three years, the NWDA will work closely with Visit Britain, DCMS and other RDAs to secure national survey improvements and a means by which nationally funded and managed surveys can be supplemented at a regional level. Vehicles for this work are:

- RDA Tourism Leads Group

RDA Directors of Tourism meet quarterly to discuss tourism issues and jointly plan future developments. Securing improved tourism intelligence for the regions is a priority for the Group.

- Partners for England

Partners for England is a review group that has been set up to discuss and take forward priorities for regional tourism within England. It involves South West Regional Development Agency on behalf of RDAs, DCMS, Visit Britain and leading industry members. NWDA attends meetings and contributes papers.

- UKOS Steering Group

NWDA is representing RDAs on a national UKOS steering group, the objective of which is to secure improvements to the new UKOS survey, commencing March 2007.

- Countryside Agency - Workshops and Liaison on England Day Visits Survey

NWDA will continue its close liaison with the Countryside Agency to discuss the England Day Visits Survey, including possible RDA involvement in future surveys.

- Individual Meetings with Visit Britain, DCMS

These will continue to take place to discuss specific projects/issues as required.

- Northern Way Research Group

NWDA will continue to liaise with research managers in Yorkshire and the North East to share research knowledge and explore potential opportunities for joint working. Consideration will be given to setting up a wider RDA tourism research group.

Improvements that are already in place include:

(i) United Kingdom Tourism Survey (UKTS)

From May 2005, the methodology for UKTS changed from telephone interviews with a sample size of approximately 50,000, to face- to-face interviews, with a sample size of 103,000. This provides a weekly sample size of around 2,000 adults aged 16 or over, representative of the UK population in relation to various demographic characteristics including gender, age group, social class, and geographical location.

UKTS is currently the only means of providing consistent, region-by-region estimates of tourism volume & value across the country. It is also a key source of data for Tourism Satellite Accounts and for Tourism Demand Modelling (discussed below).

(ii) International Passenger Survey (IPS)

The International Passenger Survey (IPS) is a large multi-purpose survey which collects information from passengers as they enter or leave the United Kingdom. It is carried out by the Office for National Statistics for a range of public and private sector organisations. The IPS is based on face to face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel. To date, the main air interviewing sites have been Heathrow, Gatwick and Manchester airports but from 2005, this was extended to include Liverpool and Prestwick airports. The inclusion of Liverpool should benefit future Northwest IPS data.

(iii) Survey of Visits to Visitor Attractions (SVVA)

In addition to its annual Survey of Visits to Visitor Attractions, Visit Britain is now conducting a quarterly survey that collects monthly throughput figures. This provides important seasonal information and enables more timely industry feedback.

(iv) England Day Visits Survey (EDVS)

The Countryside Agency has continued the survey series known formerly as the United Kingdom Day Visits Survey, by running an England-only survey during 2005. Sample size has been increased substantially from 3,200 to 23,500 and outputs will include: volume of tourism day trips; average spend and detailed breakdown of expenditure; origin of visit; whether trip was made from home or from a holiday base; whether trip was made to a town or city, a seaside resort or town, a seaside coastline or the countryside (including inland villages); reasons for not making visits; main activities undertaken; length of trip; distance travelled; length of trip; transport used;

frequency of trip; group composition; age, gender ethnic and working status. Results are due by the end of 2006.

(v) United Kingdom Occupancy Survey (UKOS)

Visit Britain has set up a UKOS Steering Group on which NWDA is representing RDAs. The purpose of the group is to secure improvements to the new UKOS contract, to commence March 2007. A revised survey brief was issued in August 2006, with interviews taking place in September.

Summary: National Surveys	
Objective	Actions
Secure Maximum Benefit From National Surveys Through Close Working with National and Regional Bodies.	<ul style="list-style-type: none"> • Continue drive for improved national tourism intelligence through RDA Tourism Leads Group and Partners for England. • Work with Visit Britain to develop improved UKOS. • Liaise with Visit Britain on quarterly Attractions Survey. • Liaise with Countryside Agency on England Day Visits Survey. • Liaise with Northern Way and other RDA research contacts on research issues and potential joint working opportunities.

4. Regional Research

Alongside the work to secure maximum benefits from national surveys, a comprehensive regional research programme will incorporate the following areas:

- Volume & Value Statistics
 - STEAM
 - Tourism Satellite Accounts
 - Economic Impact Analysis
 - Tourism Demand Model
- Industry Performance Surveys
 - Serviced Accommodation Occupancy Surveys
 - Self-Catering Accommodation Occupancy Survey
 - Visitor Attractions Survey
 - Business Performance Survey
- Market Analysis
 - Visitor & Spending Survey
 - Visitor Perceptions Study
 - Market Segmentation Studies
 - Regional Day Visit Research
 - Visitor Profile & Perceptions Overview

4.1 Volume & Value Statistics

4.1.1 STEAM

STEAM (Scarborough Tourism Economic Activity Monitor) is an economic model owned and operated by Global Tourism Solutions (GTS). The model provides estimates of tourist numbers, tourist days and total revenue generated for:

Tourists staying in serviced accommodation
Tourists staying in non-serviced accommodation
Tourists staying with friends/relatives
Day Visitors

It uses a “bottom-up” approach i.e. estimates are built up from local level data such as accommodation stock records, occupancy survey, attractions, TIC and events data. Over the next three years, STEAM will continue to be the main source of volume and value statistics for the region.

During 2005, NWDA and GTS undertook a detailed examination of STEAM inputs, resulting in the following conclusions and recommended next steps:

1. The STEAM methodology for generating estimates of overnight tourism is a sound, logical approach that uses a detailed analysis of accommodation stock, combined with local occupancy data. To date, only Cumbria has been able to provide robust local occupancy data and there is now an urgent need to improve occupancy information for the remainder of the region. Next steps for occupancy surveys are discussed in 4.2 below.
2. At the beginning of each year, GTS undertakes a comprehensive collection of accommodation stock data for each district across the region. This in itself is a valuable piece of work, providing a detailed analysis of the region’s accommodation product. The stock collection process would be greatly facilitated if all GTS stock information were incorporated within each tourist board’s DMS. Cumbria Tourism has already done this and we will work with the tourist boards and GTS to do the same for the remainder of the region.
3. Estimating Day Visitor Volume is a very complex area, confused by a multitude of alternative definitions and means of assessment. The day visitor market accounts for a significant proportion of overall tourism spending in the region and it is essential that we improve our means of estimating numbers and spend. Two key actions for NWDA are:
 - to pursue opportunities for improved day visitor data from national research.
 - to undertake regional day visitor research in 2006/07.
4. In order to keep up-to-date with STEAM reports and developments, GTS will provide quarterly STEAM progress reports at the regional tourism research group meetings. In addition, regular STEAM development meetings will take place between GTS and NWDA to discuss possible development opportunities such as understanding the contribution of business tourism; and seeking a

better understanding of economic value achieved within a given economic space.

4.1.2 Tourism Satellite Accounts

Tourism Satellite Accounts are being used increasingly widely both within the European Union and elsewhere in the world. They have emerged as the recommended way of measuring a nation's economic significance of tourism and the methodology has the approval of the UN, World Tourism Organisation, OECD and EUROSTAT. The UK First Steps report was published in 2004, the English regions report in 2005.

In the foreword to the UK Tourism Satellite Account Report, the Minister for Sport and Tourism states: "Better data provision is one of the five key priorities for tourism policy set out in Tomorrow's Tourism Today, which we launched in July. Tourism Satellite Accounting will make a significant contribution to this by deepening our understanding of the sector. In the longer term, its potential to inform policy-making and private sector investment should improve both our domestic and international promotional efforts, and our management of the tourism economy to the benefit of local communities."

NWDA will continue to play a leading role in TSA development, building on the momentum already created and sharpening the focus on tourism and its importance.

4.1.3 Economic Impact Analysis

In order to improve our understanding of the economic value of tourism in the region, we plan to commission a detailed research study that will examine the different levels of impact that result from the spending of different types of visitor on different products across the region. For example, how do the spending patterns of a day visitor to Chester vary from those of an overseas visitor staying with friends/ relatives or a domestic tourist staying in a country cottage? How do these varying spending patterns translate into economic contribution to the local/regional economy? Higher absolute spending levels won't necessarily result in higher levels of contribution if the products purchased are imported from outside the region/country.

Developing our understanding of what happens to the tourist pound in our regional economy will enable us to make informed decisions about tourism investment and marketing.

4.1.4 Tourism Demand Model

Tourism intelligence tends to be historic and to date we have had no structured means of developing forward views of tourism demand. Visit Scotland has developed a Demand Model ("The Moffat Model") which is an economic and forecasting model that paints a picture of the present, produces forecasts for the future and measures the economic impact of shocks and surprises on the tourism sectors. Over the next couple of years, NWDA will work with other RDAs to develop a similar model which will become an invaluable planning tool for the region.

Summary: Volume & Value Statistics		
Project	Objective	Actions
STEAM	Secure robust volume and value statistics for the region and sub-regions	<ul style="list-style-type: none"> • Secure improved regional occupancy data (see 4.2 below) • Liaise with Countryside Agency on England Day Visits Survey • Undertake regional day visitor research • Obtain quarterly STEAM progress reports from GTS • Hold regular NWDA/GTS meetings to explore possible development opportunities e.g contribution of business tourism
Tourism Satellite Accounts	Move towards the development of a full TSA.	<ul style="list-style-type: none"> • Continue leading role in driving TSA development.
Economic Impact Analysis	Improve our understanding of the impact of the tourist pound on the regional economy.	<ul style="list-style-type: none"> • Prepare brief and commission consultancy study.
Tourism Demand Model	Enable forward views of tourism demand to be generated, thereby facilitating tourism planning & development.	<ul style="list-style-type: none"> • Work with other RDAs to develop model.

4.2 Industry Performance

Key industry performance surveys in the region are:

- Serviced Accommodation Occupancy Surveys
- Self-Catering Accommodation Occupancy Survey
- Visitor Attractions Survey
- Business Performance Survey

These are operated by or on behalf of each of the five tourist boards. Cumbria Tourism operates the surveys for Cumbria and the Northwest Regional Research Service (NRRS) operates the surveys on behalf of Marketing Manchester, Visit Chester & Cheshire, Lancashire & Blackpool Tourist Board and The Mersey Partnership.

All of the surveys provide fundamental business performance data, without which tourist boards would lack any clear understanding or ability to monitor and support their local tourism industry. In addition, the first three are essential inputs for the successful operation of STEAM.

Securing good levels of participation in industry surveys has always been difficult but over the last few years, sample sizes have dropped to very low levels. An early priority for 2006 will be to address this issue through joint tourist board action planning sessions. These will take place at the quarterly research group meetings (involving research managers from each tourist board and from NWDA), where a clear set of actions will be developed and implemented, and participation targets set for each industry survey.

Opportunities for electronic collection of data will be explored, in particular the potential for incorporating additional fields and interrogation of each tourist board's DMS (Data Management System).

4.2.1 Serviced Accommodation Occupancy Survey

Currently, two main surveys operate in the region - UKOS (United Kingdom Occupancy Survey) and LJ Forecaster. UKOS is a long standing national occupancy survey, partly funded by Visit Britain and operated by regional tourist boards. UKOS provides room and bed space occupancy, average length of stay, % bed nights for overseas guests and % bed nights for business visitors. Close to 200 operators participate in Cumbria whereas participation in the remainder of the region has dropped to below 100.

LJ Forecaster is operated by a private consultancy company – Lynn Jones Research. It focuses on the larger city centre hotels in Manchester (30 hotels), Liverpool (16 Hotels) and Chester (10 Hotels) and collects daily room occupancy, average room rate, room yield and forward bookings. To date, LJ Forecaster has been successful in maintaining its participation levels although it is expensive to operate – approximately £15,000 for a sample of up to 35 hotels, funded by NWDA, tourist boards and the hotels themselves.

It is clear that UKOS is not providing the region with sufficiently robust data due to inadequate sample sizes. LJ Forecaster is providing good data for city centre hotels although there is some concern over sustaining the high levels of funding. Initial actions for 2006 are:

- Options for collecting occupancy data to be explored by tourism research group.
- Simple regional occupancy survey to be piloted by GTS.
- NWDA to represent RDAs on national UKOS steering group.
- Opportunities to be explored for collecting occupancy data on each tourist board's DMS.
- Improved survey reporting and promotion to be developed through each tourist board.

4.2.2 Self-Catering Accommodation Occupancy Survey

Cumbria Tourist Board successfully started a self-catering occupancy survey in 2004 and an equivalent survey was launched in the remainder of the region in 2005. Approximately 150 operators take part in the Cumbria survey out of a sample of 3,500. Self-catering accommodation is less prominent in the other four sub-regions although there are still approximately 1,000 operators in all. Unfortunately, there has been little interest in participating in these areas, particularly in Manchester and

Merseyside. Options for a revised approach to collecting self-catering data will be considered during 2006, with a view to launching a new survey in 2007.

4.2.3 Visitor Attractions Survey

Annual Data

Visit Britain operates a national Survey of Visits to Visitor Attractions (SVVA). This collects data on annual throughput, admission prices, trends in revenue & marketing expenditure, trends by attraction category, % adult/child visits, % overseas visits, % local/day trip visits. The full SVVA report is produced in August each year.

Monthly Data

Since January 2006, Visit Britain has been supplementing SVVA with a quarterly e-mail survey that just requests monthly visitor numbers. In those regions (such as the Northwest) where an existing quarterly survey is already in place, Visit Britain simply requests this data from the regions and compiles summary reports. This is to ensure that there is no duplication between the national and regional quarterly surveys. In the Northwest, the quarterly survey is operated by The Northwest Regional Research Service on behalf of Marketing Manchester, The Mersey Partnership, Visit Chester & Cheshire and Lancashire & Blackpool Tourist Board. Cumbria Tourism collects monthly data for Cumbria via an annual survey. All of this monthly data will be pulled together in annual, Northwest regional attractions reports that provide an analysis of visitor numbers by attractions type, month, sub-region, free/paid admission. Quarterly summary reports will also be produced.

4.2.4 Tourism Business Performance Survey

A Tourism Business Performance Survey has been operating in the region for approximately 10 years in Cumbria and since 2004 for the remainder of the region. Each quarter, tourist boards send out a short questionnaire to all known tourism businesses (accommodation operators, attractions, restaurants) requesting feedback on trends in visitor numbers, turnover, costs, profitability, forecasts for the next quarter and comments on topical issues. The survey is currently the only forum for tourist board/industry dialogue on quarterly performance and is considered by many to be an invaluable monitoring tool.

Securing good levels of participation (outside Cumbria) is again an issue. To date, tourist boards have each mailed circa 1,200 – 1,400 questionnaires to tourism businesses in their sub-region. This has provided only around 100 returns per tourist board (Cumbria receives around 370 returns out of a sample of 2,200).

Consideration has been given to making participation a condition of tourist board membership as this would dramatically increase survey participation, enabling far more robust data to be produced and providing businesses with high quality benchmarking reports. However the consensus among tourist boards was that such a condition should not be imposed but instead, members would be “expected” or strongly encouraged to participate in surveys.

Options for securing improved participation have been explored through the regional tourism research group and a number have been implemented:

- Improved questionnaire design and feedback reports

- Tightening of survey & reporting schedule
- Setting of participation targets
- Option to participate via email
- Improved promotion through tourist boards and districts

The success of these improvements will be monitored over the remainder of 2006/07 and plans developed for 2007/08.

Summary: Industry Performance		
Project	Objective	Actions
Serviced Accommodation Occupancy Survey	Secure robust occupancy data in order to enable valid performance monitoring and successful operation of STEAM.	<ul style="list-style-type: none"> • Options for collecting occupancy data to be explored by tourism research group. • Simple regional occupancy survey to be piloted by GTS. • NWDA to represent RDAs on national UKOS steering group. • Opportunities to be explored for collecting occupancy data on each tourist board's DMS • Improved survey reporting and promotion to be developed through each tourist board.
Self-catering Occupancy Survey	Secure robust occupancy data to enable valid performance monitoring and successful operation of STEAM.	<ul style="list-style-type: none"> • Prepare for new survey to be launched in 2007.
Visitor Attractions Survey	Secure comprehensive monthly throughput data to enable valid performance monitoring and successful operation of STEAM.	<ul style="list-style-type: none"> • NRRS to continue with quarterly regional survey. • Annual and quarterly reports to be produced. • Develop participation through improved reporting and promotion by tourist boards. • Members to be expected/encouraged to participate in surveys.
Business Performance Survey	Provide up-to-date, quarterly feedback on sub-regional business performance.	<ul style="list-style-type: none"> • Implement improved questionnaire design, feedback reports, reporting schedule. • Develop participation through improved reporting and promotion by tourist boards. • Members to be expected/encouraged to participate in surveys.

4.3 Market Analysis

A number of recent, current and planned projects will contribute to our understanding of the key markets for the region and sub-regions. These are:

4.3.1 Northwest Visitor & Spending Survey 2003-2004

A major visitor & spending survey for the Northwest was undertaken during 2003-04 by The Northwest Regional Research Service on behalf of NWDA's Research Intelligence Unit. Over 30,000 face to face interviews took place across the region with information collected on age, gender, social grade, home town, activities undertaken, group size, method of booking, length of stay and means of transport. Spend information was collected for transport, accommodation, food & drink, attractions & entertainment and retail. Results are available on the tourism research web site.

4.3.2 Visitor Perceptions Study

At the end of 2005, NWDA commissioned MORI to undertake research into consumer perceptions of the region and its five attack brand destinations. The study involved a comprehensive programme of focus group interviews as well as the inclusion of a number of questions in a MORI omnibus survey. The research has provided valuable market information that will inform marketing and development work.

4.3.3 Market Segmentation Study

Locum Consulting in association with Arkenford Ltd, have recently undertaken research into market segmentation in the region. The study has involved on-line consumer research to find out more about the visitor profile of different destinations in the Northwest. A total of 2,000 interviews were completed with residents in and around the region, requesting information on day visits. The research tested a list of 65 destinations (40 inside the region, 25 outside the region) and provides a useful picture of:

- The appeal of each destination to different types of people
- The appeal of different types of experience
- Destinations where there is a commonality of appeal and which could potentially work together on marketing initiatives
- A profile of the market in the region according to the Arkenford model.

Further segmentation work, investigating the staying visitor market, is being considered for 2006/07.

4.3.4 Business Tourism Research

A programme of business tourism research will be undertaken as part of the region's Business Tourism Strategy. Work on developing the Strategy has taken place during 2006, with publication due by the end of the year. Proposed research related activities include delegate and organiser surveys at each destination, economic impact analyses and quality assessments of facilities.

4.3.5 Regional Day Visit Research

As discussed in paragraph 4.1.1 above, the region urgently requires an improved understanding of the tourism day visit market in the Northwest. A major day visitor research project will be undertaken during 2006-07 that will collect detailed data on day visit activities undertaken in the region and produce volume and value estimates for this important market segment.

4.3.6 Visitor Profile & Product Perceptions Overview

The above projects will provide a wealth of market information for the region in terms of visitor profile and perceptions of the Northwest's tourism product. In addition, there are a number of visitor surveys taking place at a sub-regional level, commissioned through individual tourist boards. The findings from these pieces of work will be pulled together and a summary overview paper produced. Knowledge gaps will then be identified and further research planned that will enable us to fully inform future product development work.

Summary: Market Analysis		
Project	Objective	Actions
Visitor & Spending Survey	Provide robust regional and sub-regional data on visitor characteristics and spending.	<ul style="list-style-type: none"> • Ensure data is easily accessible from tourism research web site.
MORI Perceptions Study	Provide an analysis of visitor perceptions of the region and its five attack brands.	<ul style="list-style-type: none"> • Use to inform marketing and development work.
Market Segmentation Study	Provide a market profile for the region by Arkenford segments and an analysis of visitor attitudes/behaviour to a number of destinations across the region.	<ul style="list-style-type: none"> • Use to inform marketing and development work. • Consider undertaking further segmentation research for staying visitors.
Business Tourism Research	Enhance the value of business tourism to the Northwest.	<ul style="list-style-type: none"> • Publish Business Tourism Strategy.
Regional Day Visit Research	Provide an assessment of the scale and nature of tourism day visit activity in the region.	<ul style="list-style-type: none"> • Commission regional day visit survey.
Visitor Profile and Product Perceptions Overview	Identify gaps and plan further research required in order to fully inform product development work.	<ul style="list-style-type: none"> • Prepare an overview paper and identify knowledge gaps.

5. Publication/Dissemination of Data

It is essential that all of the above data is not just collected and stored, but interpreted, presented and disseminated in such a way that makes it easy for people to access and use. Currently, tourism research data and reports are posted on our regional tourism research pages on the RIU web site – www.nwriu.co.uk/tourism.asp . During

2006, we will carry out a number of improvements to the site including enhancing its look and ease of use.

We will produce bi-annual trends bulletins that will be circulated amongst NWDA colleagues and regional partners. In addition, businesses that participate in industry surveys will receive regular individual feedback reports.

We will continue to work closely with the Culture Observatory to maximise opportunities for joint working, shared research and raised profile of cultural intelligence. Access to our tourism research web site will be enhanced through linkages with the planned Observatory web site (Cultural Observatory Gateway – COG).

Summary: Publication/Dissemination of Data		
Project	Objective	Actions
Publication/Dissemination of Data	Achieve maximum use & benefit of data.	<ul style="list-style-type: none"> • Enhance look and set-up of tourism web pages on RIU extranet
		<ul style="list-style-type: none"> • Produce bi-annual trends bulletins and feedback reports to businesses.
		<ul style="list-style-type: none"> • Work closely with Culture Observatory

6. Taking the Strategy Forward

The summary tables above are repeated overleaf and show the actions to be taken forward by the NWDA Tourism Team. The work will evolve over time as new developments take place, such as changes to national surveys and the increased use of electronic data collection. It will be reviewed after year 1 and amended to take on board appropriate changes and developments. By the end of 2009, a successful strategy should see the availability and widespread use of robust volume and value, industry performance and tourism market intelligence for the region. Tourist boards will have a rich data bank of performance statistics for the accommodation and attractions sectors and members will value the regular trends reports and intelligence support that they receive. The NWDA will be able to confidently report valid, top-line volume & value statistics and will have a good understanding of the economic impact of different types of visitor to the region. Marketing and development plans will have the benefit of detailed visitor survey and market analysis data and we will have started to prepare forward views of tourism demand through our forecasting model.

Summary Actions

NATIONAL SURVEYS		
Project	Objective	Actions
National Surveys	Secure Maximum Benefit From National Surveys Through Close Working with National and Regional Bodies.	<ul style="list-style-type: none"> • Continue drive for improved national tourism intelligence through RDA Tourism Leads Group and Partners for England • Work with Visit Britain to develop improved UKOS brief. • Liaise with Visit Britain on quarterly Attractions Survey • Liaise with Countryside Agency on England Day Visits Survey • Liaise with Northern Way and other RDA research contacts on research issues and potential joint working opportunities
REGIONAL RESEARCH: VOLUME & VALUE STATISTICS		
Project	Objective	Actions
STEAM	Secure robust volume and value statistics for the region and sub-regions	<ul style="list-style-type: none"> • Secure improved regional occupancy data • Liaise with Countryside Agency on England Day Visits Survey • Undertake regional day visitor research • Obtain quarterly STEAM progress reports from GTS • Hold regular NWDA/GTS meetings to explore possible development opportunities e.g contribution of business tourism
Tourism Satellite Accounts	Move towards the development of a full TSA.	<ul style="list-style-type: none"> • Continue leading role in driving TSA development.
Economic Impact Analysis	Improve our understanding of the impact of the tourist pound on the regional economy.	<ul style="list-style-type: none"> • Prepare brief and commission consultancy study.
Tourism Demand Model	Enable forward views of tourism demand to be generated, thereby facilitating tourism planning & development.	<ul style="list-style-type: none"> • Work with other RDAs to develop model.

REGIONAL RESEARCH: INDUSTRY PERFORMANCE		
Project	Objective	Actions
Serviced Accommodation Occupancy Survey	Secure robust occupancy data in order to enable valid performance monitoring and successful operation of STEAM.	<ul style="list-style-type: none"> • Options for collecting occupancy data to be explored by tourism research group. • Simple regional occupancy survey to be piloted by GTS. • NWDA to represent RDAs on national UKOS steering group. • Opportunities to be explored for collecting occupancy data on each tourist board's DMS • Improved survey reporting and promotion to be developed through each tourist board.
Self-catering Occupancy Survey	Secure robust occupancy data to enable valid performance monitoring and successful operation of STEAM.	<ul style="list-style-type: none"> • Prepare for new survey to be launched in 2007.
Visitor Attractions Survey	Secure comprehensive monthly throughput data to enable valid performance monitoring and successful operation of STEAM.	<ul style="list-style-type: none"> • NRRS to continue with quarterly regional survey. • Annual and quarterly reports to be produced. • Develop participation through improved reporting and promotion by tourist boards. • Members to be expected/encouraged to participate in surveys.
Business Performance Survey	Provide up-to-date, quarterly feedback on sub-regional business performance.	<ul style="list-style-type: none"> • Implement improved questionnaire design, feedback reports, reporting schedule. • Develop participation through improved reporting and promotion by tourist boards. • Members to be expected/encouraged to participate in surveys.
REGIONAL RESEARCH: MARKET ANALYSIS		
Project	Objective	Actions
Visitor & Spending Survey	Provide robust regional and sub-regional data on visitor characteristics and spending.	<ul style="list-style-type: none"> • Ensure data is easily accessible from tourism research web site.
MORI Perceptions Study	Provide an analysis of visitor perceptions of the region and its five attack brands.	<ul style="list-style-type: none"> • Use to inform marketing and development work.
Market Segmentation Study	Provide a market profile for the region by Arkenford segments and	<ul style="list-style-type: none"> • Use to inform marketing and development work.

	an analysis of visitor attitudes/behaviour to a number of destinations across the region.	<ul style="list-style-type: none"> • Consider undertaking further segmentation research for staying visitors.
Business Tourism Research	Enhance the value of business tourism to the Northwest.	<ul style="list-style-type: none"> • Publish Business Tourism Strategy.
Regional Day Visit Research	Provide an assessment of the scale and nature of tourism day visit activity in the region.	<ul style="list-style-type: none"> • Commission regional day visit survey.
Visitor Profile and Product Perceptions Overview	Identify gaps and plan further research required in order to fully inform product development work.	<ul style="list-style-type: none"> • Prepare an overview paper and identify knowledge gaps.
PUBLICATION/DISSEMINATION OF DATA		
Project	Objective	Actions
Publication/Dissemination of Data	Achieve maximum use & benefit of data.	<ul style="list-style-type: none"> • Enhance look and set-up of tourism web pages on RIU extranet
		<ul style="list-style-type: none"> • Produce bi-annual trends bulletins and feedback reports to businesses.
		<ul style="list-style-type: none"> • Work closely with Culture Observatory