TCI Research – Tourism Competitive Intelligence
Global Competitive Data for a Global Competitive Tourism

Measuring
Managing
Designing
Visitor Experience
The Visitor Experience concept was already formulated 140 years ago...

“Authentic travelers do not look for discovering new landscapes. They look for discovering landscapes with new eyes.”

Marcel Proust – 1871
(famous French Novel Writer)

Engaging visitors to live an emotional experience that will encourage storytelling of your destination.
The Visitor Experience - Agenda

- Experience Impact on the destination competitiveness
  - Influencing the experience
  - Experience management, design and innovation
Data Source: TRAVELSAT

- A research platform powered by TCI Research
- Global Benchmarking Survey launched in 2011
- UNWTO Award for innovation
- Used by 80+ mature and emerging national and local destinations in 4 continents
- Destinations’ competitiveness based on visitors' experience “from inspiration to sharing”
- Independent data collection – Global coverage
- 70+ indexes. 100+ segments and markets. 200+ destinations covered
- Survey-based data enhanced with selected Big Data analytics
Better experience today
More visitors tomorrow

Main reasons for choosing Asian destinations for the first time
(Source: TRAVELSAT 1st time leisure visitors - All Asian destinations consolidated)

- Story telling from friends & relatives: 33%
- Destination brand / must-see: 31%
- Web influence: 25%
- Special events: 21%
- Accessibility: 16%
- Prices: 13%
- Travel agency recommendation: 11%
- Newspapers: 10%
- Advertising: 10%
- Movies: 9%
- TV News: 7%

A positive storytelling generate 3 times more new visitors than advertising...

Combine with those visitors who come back because they enjoyed their previous stays, 2/3 of your destination attractiveness depends on visitors’ experience.
What impact your visitors’ emotions?

**TOP DRIVERS INFLUENCING THE STORYTELLING**

- Local communities’ hospitality
- Safety feeling
- Landscapes & beaches
- Accommodation
- Local food
- Convenience for visiting
- Cleanliness in and outside cities
- Signage, orientation
- Cultural an leisure activities
- Historical heritage
- Shopping
- Public transportation
- Road infrastructure
- Visitor info centers
- Nightlife
- Cultural shows
- Ease of parking
- Taxi service

**Social and environmental sustainability** strongly impacts guests’ emotions.

No positive emotions can be created if the **safety feeling** is not properly managed.

DMOs need to address the full experience cycle so to ensure the best storytelling effects.

Most drivers of emotions are **intangible** and not related to paying tourist services.

**Source**: TravelSat Competitive Index, all markets & destinations

PATA Guilin Forum 2015
Out of 60 experiential criteria, Asia performs...

- Above competition
- Below competition
- In line with competition

Asia delivers a good experience while facing an increasingly tougher global competition.

Source: TravelSat Competitive Index, all markets & Asian destinations
A snapshot of Asia visitor experience competitiveness

Contrasted emotions that partly refrains post-visit storytelling (-10 pts Vs competition)

Exceptional competitive value for money experience

Less competitive experience of the environment
Technology impacts experience and destinations’ competitiveness

Experience of happy digital Apps travellers Vs average visitors

- Convenience of visiting: \( \times 2.2 \)
- Signposting experience: \( \times 2.4 \)
- Overall stay value for money: \( \times 2 \)
- + 20% more post-visit recommendations
- 3 times more e-story sharing

Source: TravelSat Competitive Index, all markets & destinations
Long-lasting impact on destination experience

Mega events can contribute in shaping visitors’ experience in a long-term following to massive investments realized in infrastructure and human capital directly affecting positive storytelling.

PATA Guilin Forum 2015
Long-lasting impact on destination experience

TRAVELSAT COMPETITIVE INDEX ©

Major works related to convenience, assistance, “comfort” of visiting and architecture still produce experiential benefits

Pre-Olympics

Competition

Post-Olympics

PARKING CONVENIENCE
VISITOR INFO CENTERS
SAFETY FEELING
ARCHITECTURE
PUBLIC TRANSPORT
ACCOMMODATION HOSPITALITY
SIGNPOSTING
AIRPORT ACCESS

75
196
228
250
199
196
199
215

Long-lasting impact on destination experience

PATA Guilin Forum 2015
Long-lasting impact on destination visitor economy

Post Olympics incremental benefits

+5% post visit reco

+17 M viral contacts

+ € 95 M tourism receipts

Guestimate – Impact generated from additional first time visitation mostly prompted by viral contacts. Additional impact may also come from more spending per capita during the stay and higher repeat visitation.
Destination experience **influenced by films**

50 millions of international tourists are influenced by films

27% of Asian visitors choose London thanks to movies …

**TOP 10 RANKING**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iceland</td>
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<tr>
<td>Thailand</td>
<td>179</td>
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</tbody>
</table>

Film induced attraction index (average destination index = 100)

Thanks Leonardo ?...

PATA Guilin Forum 2015
Impact on destination experience sharing

Mont-Saint Michel “Tide of the century”

Special natural event experience can massively increase destinations’ digital brand presence
Measuring impact on destination experience sharing

Volume of web social media conversations

80% of positive web sentiment generated

Hashtag-based brand impact analysis

Word Cloud

#foodtravelchat 23 #france 11 #travel 7 #Europe 4 #ttot 1
#TBEX 4 #travelpics 4 #Castles 4 #tagesschau 3 #MontStMichael 2
#unescoworldheritagesite 2 #picoftheday 2 #daytrip 2 #Normandy 2
#fantastic_earth 2 #gothic 1 #bayofmontsaintmichelfrance 1 #GalaxyS6 1
#apartments 1 #tours 1 #traveling 1 #Vente 1 #magical 1
#TopVentasAmazon 1 #BlueCastle 1 #tourist 1 #TopLivres 1 #amazing 1
#Picser 1 #LivresEtrangers 3 #AS 1 #hotels 1 #Paris 1 #World 1
#Barometre 1 #castle 1 #VerizonS6sweeps 1

Related messages

**oferta amigo** AmigoOferta
Mont Saint-Michel in: Mont Saint-Michel in the morning, France
http://t.co/PSSweG8dw0

9 minutes ago

**Тимофей Хитровок0** shane51381
A superstite has turned France's famed Mont Saint-Michel into an island and then retreated out of sight, delighting thousands of visitors
An outstanding **MICE experience** can put your destination high on meeting planners’ agenda…

The largest Corporate Event ever organized in Europe by a Chinese Company in Nice
6500 employees populating the « Promenade des Anglais »

Over 300,000 mentions on Google!
Managing and Designing Visitors ‘experience

A Case Study in FRANCE
A leader challenged by a growing competition
A competitive gap measured in visitor experience

<table>
<thead>
<tr>
<th></th>
<th>Overall experience</th>
<th>Value for money feeling</th>
<th>Post-visit storytelling</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRANCE</td>
<td>161</td>
<td>90</td>
<td>72%</td>
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<tr>
<td>REGIONAL NORM</td>
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<td>128</td>
<td>72%</td>
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<tr>
<td>COMPETITOR A</td>
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<tr>
<td>COMPETITOR B</td>
<td>186</td>
<td>183</td>
<td>73%</td>
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</tbody>
</table>

TRAVELSAT COMPETITIVE INDEX ©

FRANCE 161 90 72%
REGIONAL NORM 180 128 72%
COMPETITOR A 195 153 78%
COMPETITOR B 186 183 73%

HIGHEST VALUE
LOWEST VALUE

TRAVELSAT COMPETITIVE INDEX ©
A highly competitive cultural and leisure experience…
...but the experience does not fully « worth it »
Actions decided to improve the visitor experience

“Controlling” the visitor experience by making the industry adopt a State Quality Brand

Enhancing visitors experience by Supporting 20 local “Destination Contracts” that aim at branding special visitor “emotions”

- Oenology in Champagne
- Art of living in Provence
- Paris, augmented city
- **Industry & culture around Louvre-Lens**
- Ecotourism in Brittany
- 4 seasons in the Pyrenees
- Mountain wellness in the Jura
- ...
State Quality Label positively impacts experience

Experience Index - State Label Hotels Vs averages for France and competition

Visitors staying in State Quality Hotels

Similar positive impacts were measured in campsites, attractions and restaurants
Designing a **new visitor experience**: “ALL” case study
A new visitor experience that fits the local place DNA

- A new destination concept designed around two internationally renowned brands: UNESCO coal industry remembrance sites and the new Louvre museum extension in Lens city.

- A cultural and all-sense experience designed in a former industrial place that was not particularly attractive for tourists before.

- A differentiating and innovative destination concept that was built on the local heritage DNA, turning clichés into smart USPs for attracting new visitors and encourage storytelling.

- An experience design touching all aspects of the visitor experience: attractions, transportation, local food, accommodation, arts & handicraft…

- An experience design created together with the local population.

- An experience design optimized by researches and data.
Experience Design: starting from local “sense of place”

- Inventory of dominant colours, tastes, shapes, matters, landscapes, architecture and people capital that best reflect the true local story.
- Analysis of TravelSat data to identify the local destination competitive strengths and weaknesses based on visitors’ experience.
Experience Design: creation of one “Identity Brand”

The “ALL” destination visual brand identity was designed using the dominant cultural roots codes.

Coal black and Brick shape
Experience Design: attracting with international brands

The “ALL” destination is built on two major brands (Louvre-Lens Museum and UNESCO world heritage sites) but aims at irrigating the whole territory with over 30 tourists cultural, heritage and memorial attractions accessible in a distance of 30 minutes drive.
Experience Design: a consistent experiential marketing

The ALL sense of place is developed in all the visitor journey: accommodation, transportation, architecture and local food experiences.
Experience Design: a consistent experiential marketing

The ALL destination **Trend Book** was designed and distributed to all local private players so they can **align to the brand identity** while creating innovative handicraft products in all steps of the visit.
Experience Design impact

2 millions visitors

$ 42 millions in the local visitor economy

+ 67% of visitors have a better image of the region

+ 35 pts of *cultural experience* Vs regional competitive norm (TravelSat Indexes)

+ 50 pts of *guided tours and excursions* Vs regional competitive norm (TravelSat Indexes)
The Visitor Experience

TAKE AWAYS...
5 Take-Aways

1. Visitor experience massively drives your Visitor economy
2. Before building positive emotions, address first potential negative feelings
3. Do not hide your destination reality behind virtual reality
4. Activate storytelling only if you are sure of your story quality!
5. Guide and evaluate your destination experience strategy with research!
Is your destination competitive?

TCI Research is a global independent agency leading in international tourism competitive research and destinations’ rating. TCI helps public and private players of the visitor economy around the world to improve their competitiveness bringing them actionable insights and metrics for guiding and evaluating their decision. TCI carries out the UNWTO Award Winning TRAVELSAT© Competitive Index, a reference standard survey benchmarking destinations’ competitiveness and attractiveness based on visitors’ experience from inspiration to sharing, combining advantages of structured surveys and Big Data analysis.

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