



The Tourist Information Centre (TIC) of the Future

Research, design, innovation

A project carried out by students of the programme M.A International Leisure, Tourism and Events Management



Stenden



The Tourist Information Centre (TIC) of the Future

Research, design, innovation



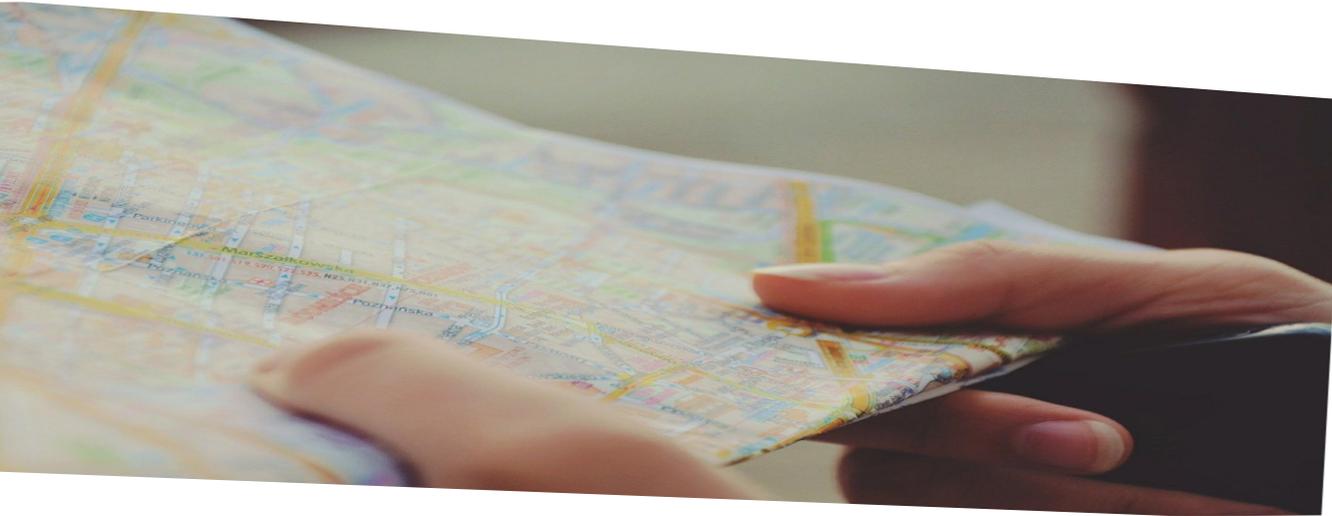
European Tourism Futures Report: Nr. 61
ISSN: 2212-9804

In cooperation with:
Kennisnetwerk Destination Nederland

For more information:
etfi@nhlstenden.com
www.etfi.nl

Table of Contents

Colophon	-
Table of Contents	-
Project Group	-
1. Introduction	2
1.1 Background and context	2
1.2 Aim and purpose	2
1.3 Outline for the report	3
2. Situation Analysis	4
2.1 Current issues and barriers for TICs in the Netherlands	4
2.2 Current debate	7
2.3 Why innovate?	8
3. Trend Analysis	9
3.1 Travel Information Search Behavior	9
3.2 Customer Service	10
3.3 Use of Technology	12
3.4 Visitor Experience	14
4. Future outlook	16
4.1 Discussion	16
4.2 Perceived issues and barriers	20
4.3 Opportunities for the future	20
4.4 Attention points for the future	21
5. New Model	23
5.1 The Model and self-evaluation Table	23
5.2 Instructions	27
6. Conclusion	28
7. References	29
8. Appendices	33
8.1 List of interviewees/contributions	33
8.2 Canvas	34



Colophon

The study is conducted by MA students of NHL Stenden University of Applied Sciences in Leeuwarden, The Netherlands. The students have been supervised by a researcher of the European Tourism Futures Institute (ETFI). The ETFI is the research institute of the Academy of Leisure & Tourism, NHL Stenden.

Copyright © 2020, European Tourism Futures Institute

Information from this document may be quoted, provided the source is cited.

The greatest care has been taken in compiling this report. However, ETFI is not liable for any direct or indirect damage resulting from the information provided in this publication

ISSN: 2212-9804

Pictures: unsplash.com & pixabay.com

For more information:

European Tourism Futures Institute
Telephone: +31 (0) 58 244 192
E-mail: etfi@nhlstenden.com
Website: www.etfi.nl

A project carried out by students of the programme M.A
International Leisure, Tourism and Events Management

Project Group:

Catarina Senra Barbosa
Cheng-Hsun Yang
Bima Surja Atmaja
Lucija Šorić
Nai Wen Chang
Tu Duyen Ho

Supervisor:

Bernadett Papp (ETFI)

1. Introduction

1.1 Background and context

Tourist Information Centres (TICs) have always been considered an important visitor service facility, actively promoting their destination and providing reliable information to tourists. With the age of information, this crucial role has been taken from TICs, as visitors can access information as easily as from their smartphones. Threatened by the evolution of technology and due to the lack of visits, many physical TICs had to close their doors. In 2017, a knowledge platform known as Kennisnetwerk Destinatie Nederland was created, unifying 80 City and Destination Marketing Organisations (DMOs) to share expertise from the professional field, exchange information and interests and offer support to each other.

The project The Tourist Information Center (TIC) of the future represents an internal advisory report for Kennisnetwerk Destinatie Nederland and has been established by six students completing a master's degree in International Leisure, Tourism and Events Management at NHL Stenden in Leeuwarden.

1.2 Aim and purpose

The project invited the students to question the current use, design, offer and operation of visitor centers. The aim was to create a general and scalable model for TICs in the Netherlands. The model gives an overview of various adaptations and considerations a TIC can undertake to satisfy the changing needs of contemporary travelers.

1.3 Outline for the report

The report is divided into six chapters.

The first chapter introduces the project team and the client. Furthermore, the project's aim and purpose are described, along with an explanation of the chapters.

The second chapter compiles collected information on the current situation of TICs, highlighting their challenges and current debate about their relevance.

The third chapter offers an insight into emerging trends in travel information search behaviour, customer service, visitor experience and technology use.

The fourth chapter clusters data gained from hospitality professionals and members of the Kennisnetwerk Destinatie Nederland through interviews. This chapter analyses the existing gap between the current operation of TICs and the needs perceived by experts of the industry, underlining attention points for the future and enabling the creation of a model.

The fifth chapter illustrates a scalable model with suggestions based on collected resources and information provided by professionals. The model will serve as a tool to assist TICs in the transformation of adapting to changing visitors.

The last chapter proposes a conclusion that summarizes the main parts of the report.

2. Situation analysis

This chapter analyses the current situation of TICs in the Netherlands. By investigating macro- and micro-environmental factors that affect visitor centers, current issues and barriers are identified. The current debate around the relevance of physical TICs and the need to innovate and adapt to altering needs are underlined.

2.1 Current issues and barriers to TICs in the Netherlands

With the development of technology, the traveler's information search behaviour has shifted from visiting the TIC on site to entering key words into online search engines. In this context, the role of TICs is confronted to a crisis of replacement, which has already led many centers around the world to face closure (Davies, 2011). In this generation of information explosion, tourists can easily find destination and travel information, receive recommendations from previous travellers and be influenced by the idealisation of destinations on social media, all from their smartphone. Meanwhile, the use of TICs has declined sharply over the last decade (Davies, 2011).

Nevertheless, a study found that although the rate of tourists that anticipate to visit TICs before reaching the destination is low, the amount of visitors that use TICs to obtain travel advice once they reach the destination is still significant (Simpson, 2016). With a physical building, visitors have more opportunities to receive travel advice and information by paying a visit to the professionals in the local TIC.

Inspiration Centers

The newest TICs in the Netherlands have strategically placed the focus on various concepts such as social interactions, projection, storytelling, desire and emotional experience. The so-called Inspiration Centers offer a visit where tourists can see, hear and taste the destination. The goal is to inspire visitors to do more than they actually intended. These centers improve the reception of visitors, the management of emotions and the experience at the tourist office. However, the pressure on financial resources is enormous; physical construction, labour costs, and daily expenses are all big challenges to evolve the operation.

Requirement of super-concierge services

Currently, many TICs in the Netherlands answer to the traditional role as tourism information source. Their services as stated on their website include tourist information about the location and the region, lodging tips, maps and plans for walking, cycling and car tours, guided tours, admission tickets and some offer souvenirs and rainwear (Holland.com, n.d.).

The rapidly changing trends in tourism, influenced by the experience economy, force TICs to adopt the role of "super-concierge", demanding the capacity to offer a bouquet of personalised services to visitors (Nessi, 2019). Over recent years, many TICs have changed their approach in order to innovate and adapt to current customer needs. One example would be the transformation of various TICs into Inspiration Centers, revealing a much more authentic image of the Dutch DNA to the visitor. The new mission focuses on providing expertise on specific themes, offering individual and accurate support and expanding to new services such as workshops and wine tasting, among others (Les cahiers du tourisme, 2019).

Furthermore, the altering preferences of tourists have become more and more inclined towards deep and authentic travel that pursues unique travel experiences closely tied to local life (Papworth, 2016). In addition, there is a growing market of short-term tourism, where people take two to three days off to travel. TICs can put their "super-power" into work by responding to these travelers and offering interactive and personalized travel itineraries based on customer preferences.

Local collaborations

The inclusion of the local community and hospitality professionals in the transformation of TICs has brought many benefits to the development of the new visitor centers. Creative collaborations with local businesses not only generate revenue for the TIC itself, but have a positive impact on the local economy. Utrecht Marketing is a good example of an organisation that engages with the local community. In their TIC, they sell locally produced keychains and candles made from resources of the region. They collaborate with the surrounding TICs of the province and cooperate with educational institutions to improve data collection. The stimulation of local collaborations fits seamlessly into Kennisnetwerk Destinatie Nederland's vision of a visitor office, mixing the destination's DNA and local makers (VVV-Nederland, 2020).

Future focus for tourism in the Netherlands

The Netherlands Board of Tourism and Conventions has issued the 2030 Perspective-Destination the Netherlands, to which Kennisnetwerk Destinatie Nederland contributed as a key partner. The 2030 Perspective displays the country's new vision, as a tourist destination benefitting all Dutch citizens, by considering the interests of stakeholders such as visitors, businesses and locals (NBTC, 2019). Regional collaborations connecting the right stakeholders, have proven an effective strategy in the past. However, the ability for TICs to apply this approach, depends on numerous factors, such as their current stage of development and the destination's accessibility. Moreover, extra focus has been placed on the livability of cities, which are heavily impacted by the number of visitors increasing every year. On the one hand, the lesser known Dutch destinations do not benefit much from opportunities created by the visitors' economy, whilst on the other hand, "hot" destinations such as Amsterdam face issues of overtourism. Therefore, the future strategy focuses on destination management and development rather than city promotion and marketing. The NBTC and the tourism industry have recognized the significance of a proactive development strategy that aims to improve economy, livability, ecology and identity (NBTC, 2019).

According to the Netherlands' Board of Tourism & Conventions, Dutch TICs main motto states that the whole Netherlands is appealing. The goal is to spread visitors over different periods into different regions, where local TICs can demonstrate their important role. They need to adapt products and services to showcase the uniqueness of the regions and underline the characteristics of each destination. It is essential to find the right strategy to communicate these products to the visitors, in the context of marketing and customer experience. An opportunity for TICs would be to adopt the role of a mediator between local producers and visitors, by adding informative value using storytelling. Besides economic resources, trained and educated employees are crucial to the success of this strategy. Another key factor to consider is sustainability and how TICs can take action to improve the destination by implementing the sustainability goals. At the end, the main priority for NBTC is to keep the welfare, wellbeing and prosperity of all Dutch citizens (NBTC, 2019).

2.2 Current debate

The current debate questions the weight and significance of TICs in the tourist and economic landscape of many countries. The Netherlands has created a dynamic knowledge network to support TICs on a daily basis, strengthen communication to gain visibility and thus develop partnerships with other institutions. This network powers the relevance of Dutch TICs and enables them to innovate and anticipate.

There is currently no standard scale in place to measure the performance of TICs. While the number of visitors varies considerably depending on the region, the interaction with employees, the provision of information and the availability of products are all influential in the determination of performance (Reiser, Williams, Hughes, & Sanders, 2014). Moreover, the subsequent tourist travel arrangements and the economic benefits made through the tourist offices must be considered. Through such performance analysis, TICs can become aware of their shortcomings, identify potential and critical factors for stakeholders and determine their value in attracting investment and visitors (Haeberlin, 2014; Reiser et al., 2014).

The intention of the model is to be used by every TIC, independently of their size. Hence, it must accommodate the conditions and needs of different regions and make specific performance evaluations based on the facility it will apply to. Therefore, a measurement scale can play a crucial role on making the most efficient suggestions for future management and development.

Due to the virus COVID-19, the entire tourism, leisure and hospitality sector has come to a standstill; the catering industry remains closed and events are canceled until September 1st, 2020. TICs were also initially not operating and according to Gastvrij Nederland (VVV Nederland, 2020) 2020 was considered a lost year for tourism. Visitor offices will never be able to "save" the tourism industry, but they can develop contingency plans and prepare visitor centers nation-wide to extreme circumstances, to respond with resilience and adapt faster to necessary changes.

2.3 Why innovate?

The closing of many tourism offices around the world has driven the necessity for Dutch TICs to innovate in order to stay open. Innovation is not limited to digital technology; providing support throughout the tourist's visit and being at service from A to Z is a better approach to innovation. The role and purpose of TICs needs to go beyond a leading information source to an innovation incubator (Sonmez, 2019). The speeding pace at which the traveller is evolving, poses a huge barrier to visitor offices, as tourism products, services and activities become outdated within several months. TICs need to find ways to go even further and anticipate trends, instead of enduring current situations to be able to offer the best products and services.



3. Trend analysis

This chapter aligns TICs with general trends in travel information search behaviour, customer service, visitor experience and technology use. By analysing emerging trends and investigating the relation between the different concepts, TICs can form an understanding for future development. As a result, the knowledge of current trends that shape the experience economy will help TICs to prepare for the future.

3.1 Travel Information Search Behavior

Understanding tourists' travel and information search behaviour can help TICs produce marketing strategies in line with future trends (Van Vuuren & Slabbert, 2012) and their target market. Nowadays, looking for destination information online is the norm. Therefore, websites need to pay extra attention to online information quality and user-friendly accessibility (Majeed, 2020). In addition, the number of people using mobile technology to search for information is predicted to increase rapidly (Gong, Schumann, Chiu & Ho, 2017).

According to Nguyen (2018), digital marketing is the current trend of 2020. When visitors look for information online, they are most likely to use social media and search engines. Millennials, for instance, use Instagram to find their next destination. They look up pictures of different places on social media, to then use Google, Facebook or blogs to research about that destination. Regardless of nationalities, most millennials use English to search for online information.

There is no denying that travel information search behaviours differ based on age. Tourists under 30 look for different information on the Internet than people over 30. Visitors of a certain age still prefer to enter the TIC to ask for information or browse through brochures (Lanksy, 2016). Since those visitors do not know how to use mobile technologies effectively, they still rely on visitor centers (Zhou & Salvendy, 2017). However, these people are becoming a minority. With three in four adults owning a smartphone, people nowadays tend to use digital communications for informational advice (VisitScotland, 2017). Therefore, one-dimensional information centers will not be able to keep up with future customer behaviour development.

3.2 Customer Service

Excellent customer service is what every service-oriented organisation is aiming for. The standards of customer service are prompted by future trends (Oraby, Bhuiyan, Gundecha, Mahmud, & Akkiraju, 2019). With the commitment of top management, organisations are able to provide more comprehensive services to the visitor, even under a competitive environment (Hamir, Salleh, Mohd Said, Ariffin, & Ahmad, 2020). The following concepts and management styles can contribute to a better quality of customer service.

Omnichannel Support

With the emergence of various information channels on the Internet, it is difficult to control customers' browsing behavior. Omnichannel support treats every visitor experience as a single journey by placing the customer at the center (Olmstead, 2020). This strategy connects all channels used by the customer seamlessly, including sales and marketing (Winkler, 2019). An omnichannel approach can also find out at which point the customers are in their search, to then provide them the information, instead of leading them to where they can find it.

Artificial Intelligence Service

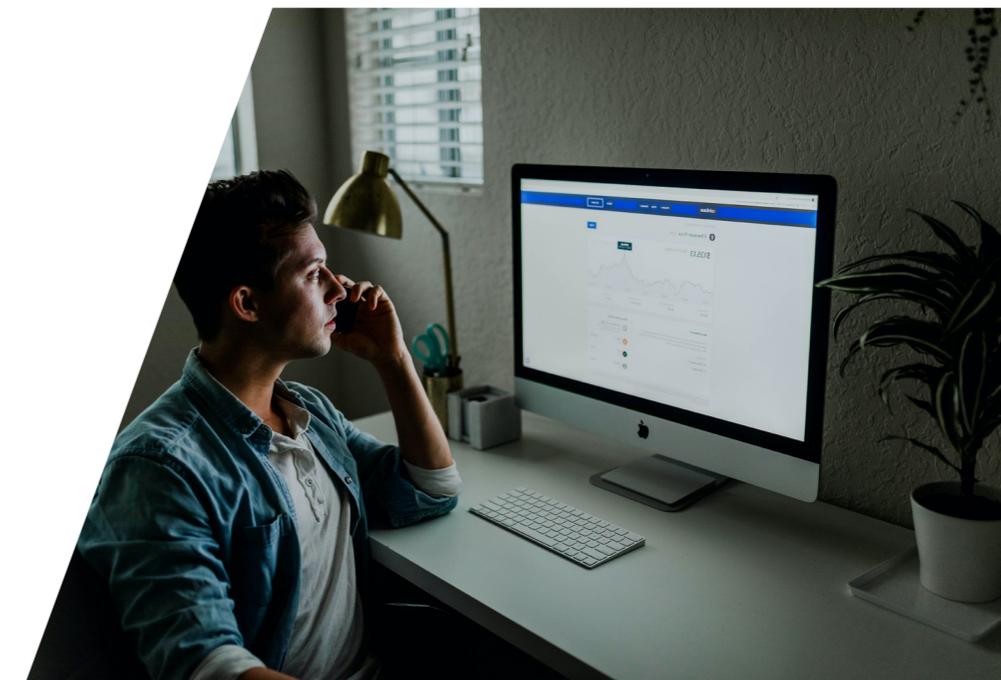
Artificial Intelligence (AI) cannot only save costs for human resources, but also answer a user's questions in terms of customer service. For example, automatic chatbots can answer visitors' questions at any time. If the chatbot does not know the answer to a question, the software connects to a human agent (Olmstead, 2020). Through the use of big data, a list of frequently asked questions can be generated by an algorithm. Chatbot has become more advanced and capable of handling complex requests, enabling customer service to become faster and more efficient. Furthermore, utilising robot assistants could be another future trend that would provide AI services to the visitor (Vincent, 2019).

Improvement of real-life communication

Even though the chatbot or robot assistant might provide effective information and an innovative customer experience, many visitors still prefer human contact. To reach more customers, despite the obstacles of distance, it is necessary to make methods such as live chats, virtual calls or video calls available. Notably, under the current circumstances of COVID-19, those online services play a crucial role in providing continuous customer service. To be resilient to future occurrences, it is inevitable to put a robust and well-functioning online service in place.

Localizing foreign social medias

Localizing social media is essential to serve a varied group of visitors, since not everyone in the world uses the same channels nor messaging apps. For example in East Asia, people tend to use Line in Japan and Taiwan, Wechat in China and Naver in Korea (Mao, 2019), while in Europe, apps such as WhatsApp and Viber are more commonly used. Hence, it is necessary to personalize the channels of information used to focus on specific visitor groups. According to NBTC Holland Marketing (2020), especially the number of visitors from China and Japan keep growing year by year. Although TICs in the Netherlands have targeted the Chinese market already by using Wechat to provide customer service, it is still not developed enough to reach specific tourists.



3.3 Use of Technology

Generation Y and Z embody 40% of the European population. Growing up in a digital era, they tend to lean more towards exploration, interaction and sensory experiences (Ministry of Foreign Affairs, n.d.). These generations will be influential costumers on the tourism market and are expected to represent half of all travelers by 2025. For tourism businesses to connect with these generations, transparency and adaptation to current technology trends is necessary (Ministry of Foreign Affairs, n.d.). Current trends such as audio tours, virtual concierge, the implementation of Artificial Intelligence or even social media commerce could be easily applied by TICs.

Artificial Intelligence

We are currently living in an era of big data, a term describing a large, complex and fast network of information that is hard or even impossible to process with traditional methods (Lohr, 2012). Artificial intelligence (AI), a program that simulates human intelligence and mimicks human actions (Frankenfield, 2020), is a tool used to enrich big data (Lohr, 2012). AI can be implemented in the tourism industry to gather information from visitors by the means of visual search, search engine optimisation, chatbot and digital marketing.

- Visual Search

Visual search describes a technology through which people can look up information by taking a picture (Arinci, 2020). Instead of using the keyboard, a user can insert an image into search engines to research the item they are looking for (Burgess, 2019). This technology has been on the market already for some time, but is still being improved. Even though the popularity of visual search will not surpass text-based search at the moment, this technology could be greatly used by future generations.

Digital Marketing

Digital marketing also known as online marketing and Internet advertising is a way for a company to market their products through the Internet (Andrus, 2020). Digital marketing has many shapes, such as email marketing, social media marketing and blogging among others.

- Search Engine Optimisation

Search engine researches for “near me” have increased as much as 900% from 2013 to 2017 (Casey, 2020). By applying search engine optimisation (SEO), businesses have a higher chance to capture buyers with immediate needs, as their webpages will be displayed before those that do not use SEO. Considering the fact, that most people do not go further than the second or third page on search engines, SEO is an effective way to make content more prominent and visibly easier to find.

- Geofencing

Geofencing is a virtual perimeter that applies a global positioning system (GPS) to encapsulate a geographic area. The technology gathers mobile users’ location and indicates their proximity to a certain place (Girish, 2019). Geofencing is used by marketers to promote their product by sending advertisements to people entering a certain territory.

- Beacon

Different from geofencing, beacons use bluetooth low energy to measure the proximity of the mobile user (Girish, 2019). The scope of beacons is limited to its range of signal. Similar to geofencing, this technology will allow mobile users to receive a certain message or information when they enter the range of signal.

Audio Tours

While audio guides are not a new technology on the market, the newest trend makes it possible for people to access audio tours with their personal device (Unal, Nayak, Mishra, & Joshi; 2016). Audio guides are not restricted to certain places like museums anymore, but can also be used as audio tours for big scale locations such as a city or even a country. By downloading the application or audio on your smartphone, the visitor can listen to the guide while traveling. This technology has been applied by many companies to help tourists discover a destination and can be used in combination with geofencing or beacons.

3.4 Visitor Experience

Exploration, interaction and sensory experiences are the next trends for the tourism industry (Ministry of Foreign Affairs, n.d.). These aspects highlight the fact that personal touch will be of great importance and that the implementation of future technologies will enhance visitor experience by personalising to the visitor's needs.

Augmented Reality

Augmented Reality (AR) is a virtual layer that uses computer-generated sensory to display holographic objects onto the real environment (Mitchell, 2020). This technology allows people to superimpose a virtual attribute to their surrounding and provide a composite view. AR has already been implemented in many tourist attractions including museums. For TICs, this technology can work as a promotional tool, for example as a filter on social media, or to enhance visitor experience in a more exploratory and innovative way.

Virtual reality

Virtual reality (VR) allows users, by putting on glasses for instance, to transform their surroundings into digital environments (Mitchell, 2020). This technology can be applied by TICs to make the visitor experience a certain attraction or place before physically visiting it. Therefore, VR can be used to guide visitors through a story, make them feel a certain atmosphere, as well as, give them a glimpse of the destination they want to visit.

Sensory Experience

Playing on emotion and guest relation is the latest approach applied by TICs to make the visitor wonder about the place, their feelings and human interaction (Les cahiers du tourisme, 2019). Visitor offices can position emotion at the heart of their strategies, in order to arouse desire and intrigue among visitors. Hence, placing concepts such as social interaction, projection, desire and sensory experience at the core, will boost the management of emotions and enhance the tourist's visit at the center.

Concretely, a pleasant odor that reflects the theme of the TIC can be diffused in its reception areas for example. To create more collusion between the employee and the visitor, the physical layout can be altered by eliminating the traditional counters, to make the interaction more at ease and facilitate the transmission of knowledge. The development of experiential and immersive tourism can create real awareness of emotional factors in visitors. Interactive campaigns with impactful visuals, for instance, are another way to make the client project himself more easily into the experience.



4. Future outlook

Various interviews have been conducted with hospitality professionals from TICs, DMOs and marketing organisations. The interviews enriched the project team's insight into the purpose, functioning and future of Dutch TICs.

4.1 Discussion

TICs and DMOs are acknowledging the changing travel behaviour of visitors. As a mediator between the DMO, visitors and residents, the physical presence of a TIC is more important than online. Most interviewees agreed that physical TICs are needed since they believe that face-to-face communication and interaction are inevitable and essential to the tourism industry. It allows visitors to get more personalised information and inspiration for travel. Similarly, a visit to the TIC does not have the sole purpose of asking information only, but to buy local souvenirs, learn about the history, or just to rest. The TIC in Rotterdam took even a step further by implementing an expats center providing information on housing, working and living.

With peak seasons from April to September, TICs located in big cities welcome up to 1000 visitors a day during high season with 40-50 workers, while smaller TICs receive around 100 visitors handled by 2-3 workers. The number of employees is surprisingly low with 2-5 fixed staff members, however, a lot of support is given by part-time workers, volunteers and interns.

Local collaboration

Collaborating with the local community turned out to be an important aspect of the role of TICs. To build sustainable relations within the destination, visitor centers work with local stakeholders, educational institutions, governments, and companies to maximise business, economy, tourism and destination marketing. TICs offer visitors additional value by working with local designers, artists and businesses to sell regional products, organise exhibitions and promote social projects in the visitor center. Similarly, they have cooperations with tourism related businesses to provide reliable tourism information in as many places as possible. An example of local collaboration to improve the operation of tourist offices, is the TIC in Utrecht that seeks feedback from local inhabitants by involving locals, schools and university academics actively in discussions about the development of their TIC.

Data collection

In the age of information, collecting data from visitors to optimise current operations is a must. TICs have developed individual ways on how to gather data from tourists on- and offline. While the newest tourist offices possess Smiley-feedback terminals or NFC screen technologies, others count on guest books, questionnaires and sales volume to determine popularity and satisfaction. Furthermore, TICs are obligated to communicate the amount of visitors they receive to local governments to be eligible for financial aid. Much feedback is also collected from online platforms such as TripAdvisor or in open meetings with residents and local stakeholders. Moreover, data is a necessary requirement for the adequate use of AI, visual search and chatbot. Hence, development in this area needs to be re-evaluated. The collected data can help TICs to identify their target market, as well as the needs of the visitor to optimise their product and visitor experience.

Visibility

TICs need to bring the product to the visitor more effectively. Not only personalized products, adapted services and modified activities matter, but also the way in which they are marketed. Some professionals believe that brand recognition within the destination and brand awareness online would boost the popularity of TICs. An example would be volunteers strolling around the city reflecting the VVV brand, spreading information and promoting the destination. Additionally, financial support from the government to relocate TICs to the city center or popular tourist places would strongly benefit visitor offices to gain visibility and visitors.

Physical improvements have been made by implementing themed interiors, building multi-purpose rooms and removing the traditional desk, offering an open space and an enhanced level of contact between worker and visitor. Much development has focused on the visitor experience. The addition of technology through informational touchscreens and interactive storytelling has brought new ways to deliver the Dutch DNA to visitors. Most changes have been received by visitors and stakeholders with astonishment and popularity.

Target Market

Many TICs focus on the connection with the local area. Their target market focuses on local and foreign visitors from neighbouring countries, but also international tourists. Moreover, there is a trend to market by lifestyle instead of age or nationality, as it focuses more on the visitor's interest. TICs can use the concepts of second city tourism, ground travel or slow travel to attract more sustainable tourism. These travel concepts do not only reduce pollution, but give the additional experience of local life through longer stays. With this strategy, TICs in big cities can reduce the pressure of overtourism and enhance the quality of their own services by measuring visitor experience.

Use of technology

Online and offline technologies are important tools for the future. In big cities such as Rotterdam and Eindhoven, city beacon, touchscreen monitors, audio guides and VR have been in use by TICs. They choose to introduce technology to enhance customer experience. However, visitor offices in small cities have difficulties to adapt to technology changes, especially due to financial restrictions.

Most interviewees indicate that they do not possess well-developed online services. They are eager to upgrade their customer service to keep up with the Internet generation, by creating exclusive chatting rooms in WhatsApp for example, or webshops to sell local products. Despite this, the challenges they are facing now are mostly of financial nature and the inadequacy of knowledge about how to set up online services in an efficient and low-cost way.

Many first contact moments between visitors and TICs occur online; either on their website or through social media. For that reason, social media commerce could present an opportunity to the development of a TIC online. For example, through promotion on Facebook and Instagram, more people can get an idea of the TIC, its products and services, while developing wider sales channels.

Impact of COVID-19

COVID-19 hit visitor centers especially hard during the months of high season. The number of visitors in big TICs dropped from 1000 international tourists to about 50 domestic visitors a day. This impacted the tourist offices financially, as sales have declined drastically, which lead to difficulties in paying salaries. Many TICs are also currently not promoting the destination, but will start from August and September on.

Vision of the future

In the tourism industry, a TIC represents an important touchpoint that should be taken into consideration without any exception. As an integral part of the customer journey, tourist offices have to adjust to the inevitable occurrences of the future to be able to survive. Some hospitality professionals believe that a physical visitor office is still needed in the future and that visitors require face-to-face communication and physical contact. On the contrary, for some professionals, technology will be able to take over the physical office and replace them by interactive touchscreens strategically placed in key tourism and hospitality locations or by online services such as customer service chatbots. However, the ideal vision of the TIC of the future is believed to be the combination between the physical contact and technology. By introducing Inspiration Centers in various cities, both concepts were able to be combined.



4.2 Perceived issues and barriers

During the interviews with various hospitality professionals operating at visitor centers, DMOs and city marketing organisations in the Netherlands, we came across the following challenges that are currently faced by TICs:

- Lack of financial resources
- Lack of cooperation between TICs
- Lack of cooperation from TICs (DMOs develop new ideas, but TIC not willing to adopt)
- Lack of fixed employees (due to lack of money)
- Lack of young employees with open mindsets and new ideas
- Competing with physical travel agencies and online travel metasearch engines
- Difficulties to stay up-to-date with the evolving tourist
- Products and technology become outdated much faster
- TICs located in less visible places for tourists
- No procedure in place to gather feedback from the visitor on-site
- No clear key performance indicators (KPI) in place to measure visitor experience or hostmanship to compare different TICs

4.3 Opportunities for the future

As a result of the interviews, the following opportunities could help TICs improve in the future. The opportunities are divided into three aspects:

Products

- Local products in combination with storytelling
- An online webshop (opportunity to increase revenue) to reach a larger scope of customers, aiming to buy local products and souvenirs.

Visitor experience

- Interactive terminals and recreation for children
- Common area to rest such as a lounge
- A section in the TIC (resembling a museum) where visitors get more involved with the history, culture and story of the city through the use of technology
- Brand stores, apps and technologies for younger generations
- Inspiration Centers and lifestyle marketing
- Develop feedback terminals to contribute to data collection and evaluate performance based on the quality of service

Creative Innovation

- Combine the role of TIC for tourists with a center for expats
- DMOs help the different TICs to work together
- Collaboration with universities and students

4.4. Attention points for the future

Based on the situation and trend analysis and the interviews with professionals from the sector, the following conclusion regarding the main attention points was made. It is important to keep in mind that sustainability is the key for the long-term success of each attention point.

- The role of TICs is shifting from being solely an information provider to an important contributor to quality of life (QoL) of locals and visitors.
- Employees are the heart of the TIC and the number of employees depends on seasonality (full-time, part-time, zero-hours contract, trainees, volunteers). However, all of them are significant to the operation of TICs.
- Employees must be educated, professional and have a deep understanding of the destination (history, events, lifestyle).
- Employees' place identity and place attachment connected to destination is fundamental for a meaningful transmission of information to the visitors.

- Locals' wishes and needs have to be put as the utmost priority.
- Collaboration with the local community (residents, local businesses, educational institutions, associations) is the key of the TICs' success.
- Collaboration between TICs and DMOs is fundamental.
- Data collection has a significant role for TICs and DMOs to stay updated, flexible and resilient. The implementation of information from collected data is necessary to evaluate QoL of residents and quality of experience for visitors.
- It is necessary to keep up with trends and visitors' travel behaviour in order to adapt and understand, what fits in the destination's narrative.
- Adaptation, evolution and creativity are necessary for TICs to stay relevant and integrated in the DNA of the destinations.
- Financial resources are the biggest issue of most TICs, hence plans for further development are often postponed.
- The COVID-19 pandemic should be understood as a situation to learn from and lean towards "outside the box" solutions, hence building up the destinations' resilience.
- Contact moments with visitors, both physical and online, are crucial in the creation of a bond with the visitors.
- The implementation of technological solutions is inevitable. However, to enrich the visitors' experience, there must be a cohesion between physical human interaction and technology.
- Personalised products and services with a meaningful story are the key factors for the visitors to develop a sense of place and attachment.
- Storytelling is a successful tool to add value to products and services.
- A clear mission and vision of what an ideal destination and the targeted market is crucial. The communication between DMOs and TICs is essential for this point.

5. New Model

In this chapter, a new scalable model with a self-evaluation table and a canvas are presented. The model will enable TICs in the Netherlands to evaluate their current position with the help of the table. In the Appendices, a canvas is provided to facilitate the generation of an action plan for future changes. An explanation of the model and its concepts, along with instructions on how to use the model is given.

5.1 The Model and self-evaluation Table

Based on research and conducted interviews, the spider web model in Figure 1 was established. The model has two functions. In a first phase, it represents a tool for TICs to determine their current situation by analysing the products and services they offer. In a second phase, TIC professionals brainstorm and decide, in which areas they would like to improve the operation of the tourist center. The model requires to draw two separate "threads"; one representing their current position and one showing where they would like to be in the future. The visual representation of current and targeted positions will highlight the areas, in which the TIC is progressive and in which it is lacking.

The spider web model is built on five concepts, namely Visitor experience, Technology, Data collection, Collaboration and Visibility. Based on our research on current trends and our analysis of TICs' needs, we conclude that these concepts represent the main areas, in which tourism offices can successfully evolve for the future. The concepts consist of indicators as displayed in the self-evaluation table under Table 1. The indicators represent various aspects of the "TIC of the future". They simplify the positioning within the concepts, while the table enables the creation of the "threads" in the model.

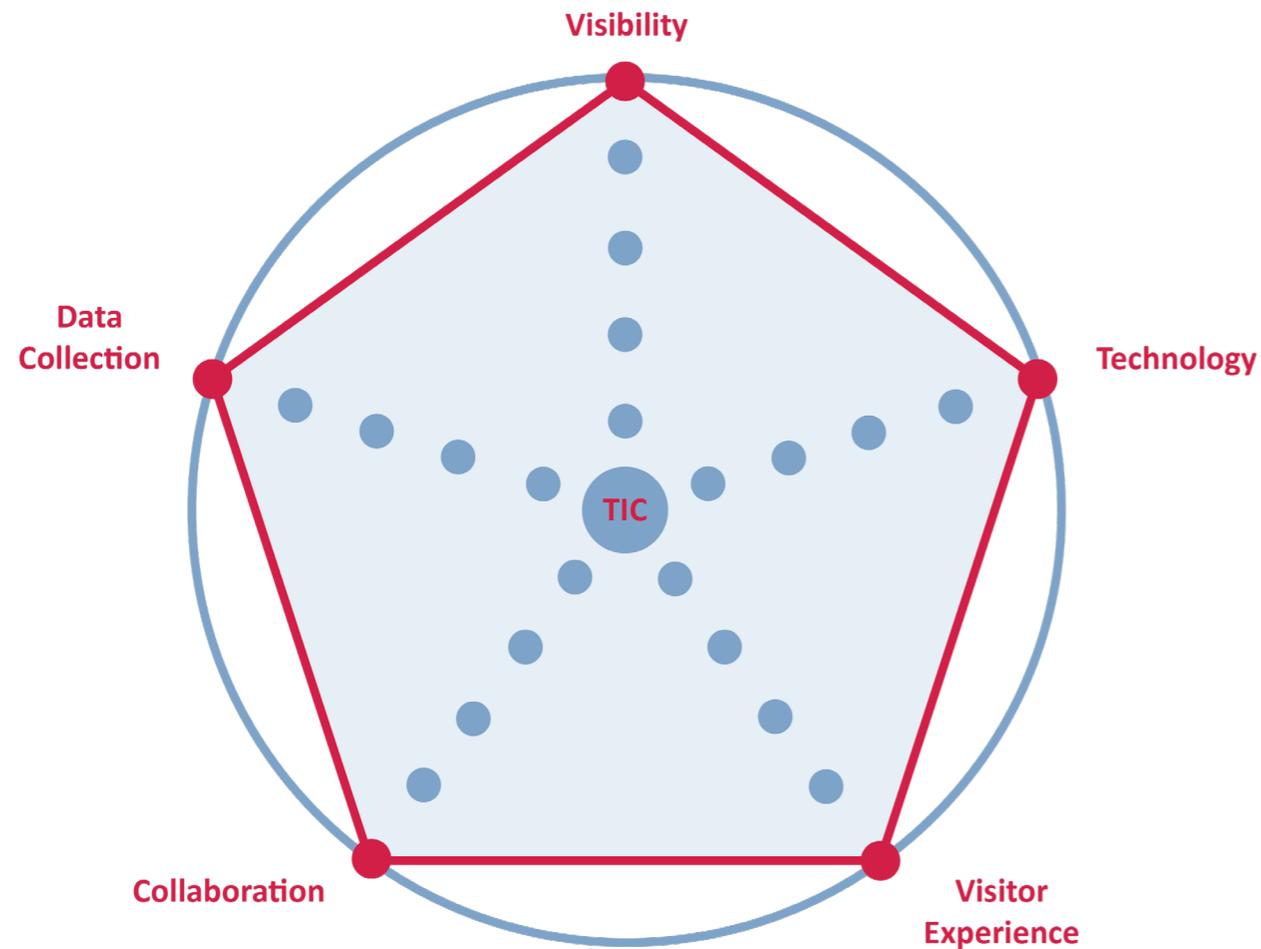


Figure 1: Model

Concept	Indicators	We have it
Technology	Website (customer services, chatbot)	
	Application (audio tour, map)	
	Omnichannel Support (integration of social media)	
	Interactive Device (VR, touchscreen)	
	Artificial Intelligence	
Visitor Experience	Building Layout (interior reflecting local DNA, multi-purpose rooms)	
	Human Resource Development (customer service, training, evaluation)	
	Storytelling	
	Information Provision (audiovisual, videographic, VR)	
	Sensory Experience	
Data Collection	Customer Contact Moment	
	Performance Measurement (KPI)	
	Customer Satisfaction	
	Forecasting (use data for knowledge)	
Collaboration	Data Sharing and Evaluation (DMOs, other TICs, stakeholders)	
	Academic Institutions	
	Local Municipality	
	Local Community	
	NGOs	
Visibility	Other TICs	
	Brand Recognition (offline, physical sign, brand shop)	
	Brand Awareness (online, SEO, Google analytics)	
	Events (workshops, exhibitions)	
	Marketing (localization, AR, beacon, geofencing)	
	Multiple Presence (TIC office, information point)	

Table 1 – Self-evaluation Table

5.2 Instructions

There are three steps to fully take advantage of the model's functionality.

The first step is to utilise the table to identify the indicators that correspond to the TIC's current offering. As the indicators include various products and services, it is possible that a TIC might have only one of the products mentioned. At this stage, the TIC decides "Are we developed enough in that aspect?". If they are satisfied, they can tick the belonging box under "We have it", however if they perceive a need to evolve for that indicator, they can leave the box clear. To proceed, the ticked boxes are counted for each concept. The following stage puts the model to action. According to the amount of ticked boxes per concept, the TIC can place dots, starting from the middle, in the model. By connecting the dots, the TIC can visualise their current position.

e.g. A TIC evaluated that within the Visitor experience concept, they meet their goals regarding their Information provision, Storytelling and Sensory experience, but not HR Development and Building layout, therefore in the model they will move three dots from the center to the outside.

The second step requires to mark the desired position for the future. For this step, it is important for each TIC to evaluate themselves depending on their own goals and resources. Based on the indicators, the TIC can place new dots in the areas they want to improve. By connecting the dots in a different color, the distinction between reality and expectation is highlighted and the areas that need improvement and development are prominent.

An example when both "threads" are included in the model.

The third step consists of an action plan to initiate change for the future. The canvas, which can be found in appendix 7.1, was developed as a tool to brainstorm about the vision and future outlook of the visitor center. The TIC can develop action steps for the different examples of each indicator. We recommend to print the canvas in at least A3 format.

e.g. A TIC evaluated that they are lacking in the Building layout indicator. They can use the canvas to write down action steps for that indicator. This will enable them to have a clear vision and a plan on what needs to be done.

The aim is to meet the set goals within a concept, hence improve the current position to the desired position in the spider web model to reach sustainable and resilient balance.

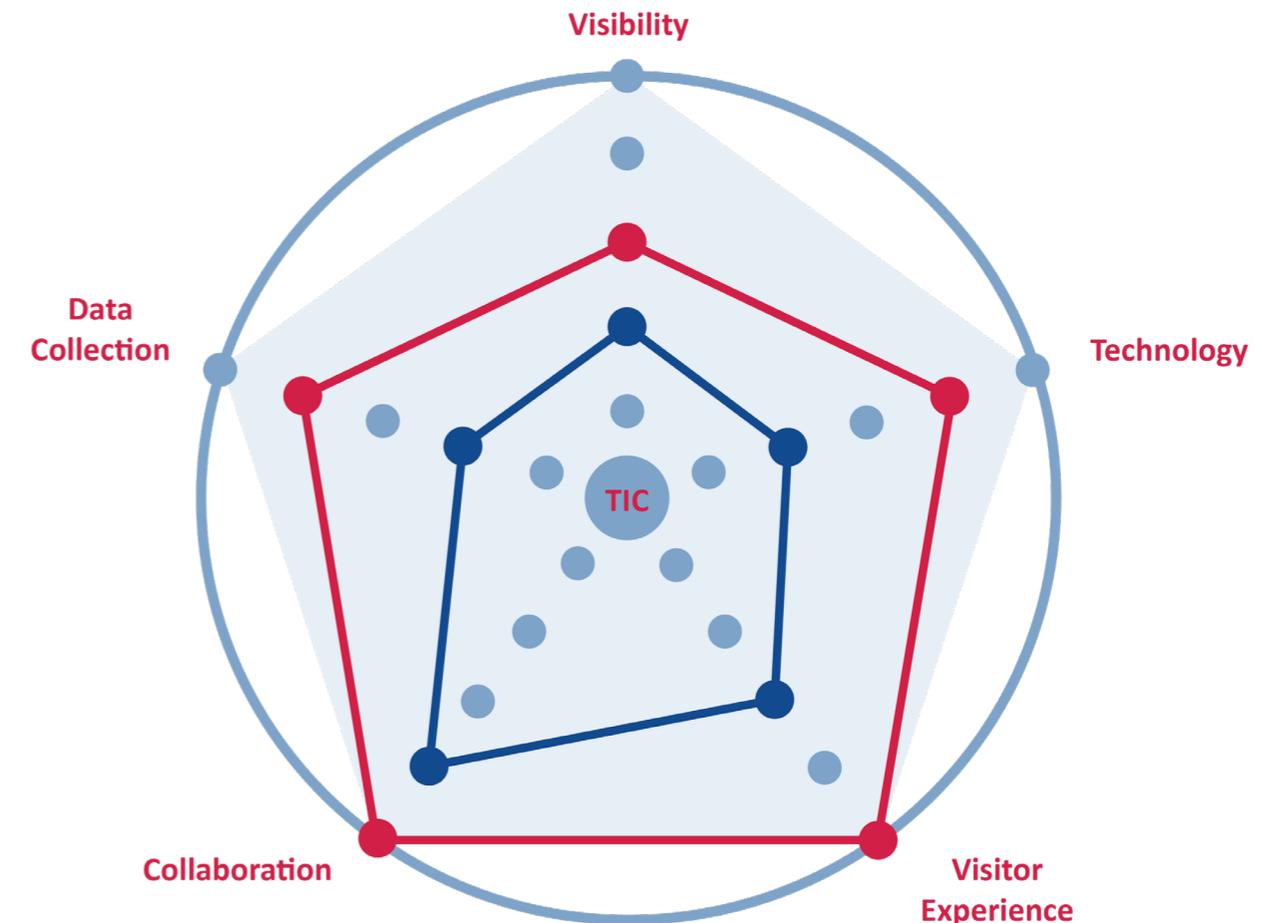


Figure 2. Spider web model example with two "threads"

6. Conclusion

Along with the age of information, the primary role of the TIC was replaced by technology, smartphones and computers. In addition, travel behavior, information provision and customer service trends are constantly changing. Therefore, TICs need to innovate and adjust their operation to avoid closure and in order to adapt and serve the needs of future visitors.

This advisory report analysed the current situation and trends by conducting desk research. Additional interviews with several hospitality professionals helped to create a clear understanding of the situation of the various TICs. By synthesising the outcomes of research and interviews, a list of perceived issues, opportunities and attention points was established. The importance here is to underline that the situation of every TIC is distinct and that barriers, needs and goals differ depending on the location, situation and resources of the tourist office.

The spider web model uses current trends as a driver to advance TIC's operation. It serves as a tool to better visualise a TIC's current position, in contrast to where it could be and highlights areas of improvement. The model can be used as a means of measurement and comparison between different TICs, as it sets a certain standard for visitor centers in the Netherlands. The canvas facilitates the creation of action steps to upgrade the concepts and indicators in need.

Lastly, the model, table and canvas represent a good base for self-evaluation and imminent development. It might be important to adjust the model in the future by adapting the concepts and indicators to forthcoming trends.

7. References

- Andrus, A. (2020). What is Digital Marketing and How Do I Get Started? Retrieved on May 27, 2020, from <https://www.disruptiveadvertising.com/marketing/digital-marketing/>.
- Arinci, C. (2020). Rising Digital Marketing Trends Predicted by Digital Agencies for 2020. Retrieved on May 22, 2020, from <https://digitalagencynetwork.com/rising-digital-marketing-trends/>.
- Burgess, M. (2019). Top Digital Marketing Trends for 2020. Retrieved on May 22, 2020, from <https://www.theedigital.com/blog/digital-marketing-trends>.
- Casey, B. (2020). 27 Digital Marketing trends to watch in 2020. Retrieved on May 22, 2020, from <https://www.impactbnd.com/blog/2020-digital-marketing-trends>.
- Davies, C. (2011). Tourist information centres face extinction: TICs closing across UK as council funds favour websites to attract visitors – but locals are not giving up without a fight. Retrieved on May 22, 2020, from www.theguardian.com/society/2011/feb/07/tourist-information-centre-closures.
- Frankenfield, J. (2020). Artificial Intelligence (AI). Retrieved on May 22, 2020, from <https://www.investopedia.com/terms/a/artificial-intelligence-ai.asp>.
- Girish, D. (2019). Beacons vs Geofencing: Which Location-Aware Technology Should Your Business Use? Retrieved on May 22, 2020, from <https://blog.beaconstac.com/2015/09/beacons-vs-geofencing-which-location-aware-technology-should-your-business-use/>.
- Gong, G., Schumann, F., Chiu, D., & Ho, K. (2017). Tourists' Mobile Information Seeking Behavior: An Investigation on China's Youth. *International Journal of Systems and Service-Oriented Engineering (IJSSOE)*, 7(1), 19.
- Haeberlin Consulting. (2014). The future of visitor centres in WA. Retrieved on May 22, 2020, from https://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/The_future_of_visitor_centres_in_WA.pdf.
- Hamir, N., Salleh, R., Mohd Said, N., Ariffin, H. F., & Ahmad, Z. (2020). The role of management commitment of service quality through job embeddedness on service recovery performance. *ESTEEM Journal of Social Sciences and Humanities*, 4, 27-35.

Holland.com (n.d.). Tourist information offices. Retrieved on May 22, 2020, from <https://www.holland.com/global/tourism/information/practical/tourist-information-offices.htm>.

Lanksy, D. (2016). Is the smartphone killing the visitor center? Retrieved May 20, 2020, from <https://www.phocuswire.com/is-the-smartphone-killing-the-visitor-center>.

Les Cahiers du tourisme. (2019). Regards croisés sur l'office de tourisme de demain. Retrieved on May 22, 2020, from <http://cahiersdutourisme.com/regards-croises-sur-loffice-de-tourisme-de-demain>.

Lohr, S. (2012). The age of big data. Retrieved on May 22, 2020, from <https://www.nytimes.com/2012/02/12/sunday-review/big-datas-impact-in-the-world.html>.

Majeed, S. (2020). Online Tourism Information and Tourist Behavior: A Structural Equation Modeling Analysis Based on a Self-Administered Survey. Retrieved on May 22, 2020, from <https://www.frontiersin.org/articles/10.3389/fpsyg.2020.00599/full>.

Mao, B. (2019). Asian Social Media: 5 Networks You Should Know About. Retrieved May 17, 2020, from <https://www.synthesio.com/blog/asian-social-media/>.

Ministry of Foreign Affairs. (n.d.). Which trends offer opportunities of pose threats on the European outbound tourism market? Retrieved on May 22, 2020, from <https://www.cbi.eu/market-information/tourism/trends/>.

Mitchell, B. (2020). Top Visitor attraction trend for 2020. Retrieved on May 22, 2020, from <https://blooloop.com/features/visitor-attraction-trends-2020/>.

NBTC Holland Marketing. (2019). 2030 Perspective: Destination the Netherlands. Retrieved on May 22, 2020, from <https://www.nbtc.nl/en/home.htm>.

NBTC Holland Marketing. (2020). NBTC handles development, branding and marketing for the Netherlands. Retrieved on May 17, 2020, from <https://www.nbtc.nl/en/home.htm>.

Nessi, J. (2019). Les offices du tourisme se transforment. Retrieved on May 22, 2020, from <https://www.horizonspubliques.fr/territoires/les-offices-du-tourisme-se-transforment>.

Nguyen, T. (2018). Marketing du lịch 2020: Xu hướng marketing ngành du lịch với công nghệ 4.0. Retrieved on May 21, 2020, from <https://marketingai.admicro.vn/marketing-du-lich-cong-nghe-4-0/>.

Olmstead, L. (2020). The Future of Customer Service: 12 Trends to Test in. Retrieved on May 16, 2020, from <https://www.nextiva.com/blog/future-of-customer-service.html>.

Oraby, S., Bhuiyan, M., Gundecha, P., Mahmud, J., & Akkiraju, R. (2019). Modeling and Computational Characterization of Twitter Customer Service Conversations. *ACM Transactions on Interactive Intelligent Systems*, 9(2–3), 1–28.

Papworth, A. (2016). Debate on future of tourism information centres in Lowestoft and Southwold. Retrieved on May 22, 2020, from <https://www.lowestoftjournal.co.uk/news/debate-on-future-of-tourism-information-centres-in-lowestoft-and-southwold-1-4417418>.

Reiser, G., Williams, D., Hughes, V., Sanders, S. (2014, August 4). The future of visitor centres in WA. Haeberlin Consulting. https://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/The_future_of_visitor_centres_in_WA.pdf

Simpson, D. (2016, July 05). The role of visitor information centres. Retrieved from <https://www.cabi.org/leisuretourism/news/25078>

Sonmez, S. (2019). Jérôme Merle : « La Fédération et les offices de tourisme sont en ordre de marche ». Retrieved on May 22, 2020, from <https://www.essor38.fr/jerome-merle-la-federation-et-les-offices-de-tourisme-sont-en-ordre-de-marche-25178.html>.

Unal, A.; Nayak, M.; Mishra, D. K.; & Joshi, D. S. A. J. (2016). *Smart Trends in Information Technology and computer Communications*. Jaipur: Springer.

Van Vuuren, C., & Slabbert, E. (2012). Travel motivations and behaviour of tourists to a South African resort. *Tourism & Management Studies*, 17(4), 295-304.

Vincent, J. (2019). Japan unveils robot assistants for 2020 Olympics. Retrieved on May 22, 2020, from <https://www.theverge.com/2019/3/15/18267055/tokyo-2020-olympics-robot-assistants-toyota-panasonic-exoskeleto>.

VisitScotland. (2017). VisitScotland to shut 39 tourist offices. Retrieved May 21, 2020, from <https://www.bbc.com/news/uk-scotland-41596610>.

VVV Nederlands. (2020). Hospitable Netherlands: Extension of measures catastrophic for the sector. Retrieved on May 22, 2020, from <https://www.vvvnederland.nl/nieuws/gastvrij-nederland-verlenging-maatregelen-catastrofaal-voor-sector/>.

Winkler, N. (2019). Omnichannel vs Multichannel: What is the Difference and Why Does It Matter? Retrieved on May 16, 2020, from <https://www.shopify.com/enterprise/omni-channel-vs-multi-channel>.

Zhou, J., & Salvendy, G. (Eds.). (2017). Human Aspects of IT for the Aged Population. Aging, Design and User Experience: Third International Conference, ITAP 2017, Held as Part of HCI International 2017, Vancouver, BC, Canada, July 9-14, 2017, Proceedings (Vol. 10297). Springer.

8. Appendices

8.1 List of interviewees

- Achterhoek Toerisme
- VVV Regio Hart van Nord-Holland
- Utrecht Marketing
- Rotterdam Partners
- Rotterdam Tourism Info
- Toerisme Veluwe Arnhem Nijmegen
- VVV Eindhoven

8.2 Canvas

TIC Web Model

Stenden etfi

Technology

Website

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Interactive Device

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Website Intelligence

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Omnichannel Support

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Visitor Experience

Building Layout

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Information Provision

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Sensory Experience

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Storytelling

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Data Collection

Customer Contact Moment

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Performance Measurement

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Customer Satisfaction

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Collaboration

Academic Institutions

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Local Municipality

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Local Community

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Visibility

Website

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Application

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Omnichannel Support

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Forecasting

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Data Sharing and Evaluation

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Interactive Device

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Website Intelligence

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

NGOs

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Other TICs

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

European Tourism Futures Reports Nr. 61
ISSN - 2212-9804



The Tourist Information Centre (TIC) of the Future

Research, design, innovation

European Tourism Futures Institute

Visiting address : Rengerslaan 8, 8917 DD, Leeuwarden
Postal address : P.O. Box 1298, 8900 CG, Leeuwarden
Phone number : +31 (0) 58 244 1992
Email : etfi@nhlstenden.com
Website : www.etfi.nl


Stenden


etfi European
Tourism Futures
Institute