Digital Tourism Business Framework

Mid Term Evaluation

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Digital Tourism Business Framework Mid-Term Evaluation

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Executive summary

Introduction

1. The Digital Tourism Business Framework (DTBF) programmes vision is to move Wales' tourism sector from relative e-business immaturity firmly into the digital business age by the end of 2014. The programme is funded by the European Regional Development Fund (ERDF) and is made up of three areas of intervention/activity:

   - business engagement – the support offered to businesses through training and consultancy advice
   - grant funding – available to individuals or groups to deliver improved business performance
   - all Wales digital marketing activities relating to the creation, development and use of the new Visit Wales website.

2. A key requirement of the ERDF is that a mid-term evaluation is carried out to assess the performance of the programme against its objectives. The aim of this report is to provide an analysis of how well the programme has performed against its objectives, a summary of the barriers to progress, how barriers have been overcome, and recommendations on how to take the programme forward.

Targets and indicators

3. As of April 2013, 569 enterprises have been provided with Information and Communication Technology (ICT) diagnostics. This is against a target of 750 overall.

4. Enterprises that responded to an online questionnaire, report that they have launched an average of 2.4 new or improved products, processes or services as a result of the ICT diagnostic; a total of 439 (against a target of 400) amongst the survey sample of 183 businesses. Please note that this

figure is based on businesses' self-assessment and will need verification before a confirmed figure is published.

5. 75% of the surveyed enterprises placed themselves at 'Step 3' on the e-business maturity ladder; 54% had moved up a step since the Visit Wales consultant's pre-diagnostic assessment. This is against a DTBF target of 12.5% of businesses for both measures. Again, please note that current step placing is based on business self-assessment and will need to be verified by a consultant.

6. 22% of the surveyed businesses have visited www.sharewales.com against a target of 15%. 2% agree they use www.sharewales.com regularly and 14% agree that it is a useful resource.

7. 44 projects assisting enterprises have been financially supported with competitive grants to develop communities and sustainable technological solutions. Of these, 33 enterprises were unique businesses eligible for claiming against the DTBF target of 50.

ICT diagnostics

8. Evidence from the 'specific targets and indicators' demonstrates that the fundamental aims and outcomes of the DTBF programme are being well progressed. In particular, 54% of businesses surveyed who received an ICT diagnostic feel that they have moved up at least one step on the e-business maturity ladder

9. 72% of surveyed businesses agree they now feel better informed about using technology in their business; 67% agree they are now confident that they are using the right technologies for their business; 58% agree they have improved efficiency through the use of technology; 57% agree that the recommendations that they have implemented have had a positive effect on their business; and agree 44% feel that they are now using and retaining customer information more effectively.

10. ICT diagnostic reports tended to act as the trigger for businesses to action changes that they knew they ought to be making. 88% of surveyed business had already thought about making changes prior to receiving the diagnostic report, but 79% of these felt that the report made changes easier and quicker to implement.

11. There is evidence of progress in terms of attracting more tourists amongst surveyed ICT diagnostic recipients; 30% of businesses felt that their visitor numbers had increased since receiving the report; 35% had experienced an increase in internet traffic. The recession and a 'lack of bedding-in period' were reasons cited for visitor numbers *not* increasing.

12. 70% of businesses who took part in the online survey had implemented an 'improvement' recommendation and 53% a 'new' recommendation. Improvement recommendations were most likely to involve website development (54%), social media (30%), internet advertising (26%) or security (23%). New recommendations focussed on social media (32%), internet advertising (16%), security (16%), online booking (15%) and hardware (15%).

13. The DTBF programme has improved its effectiveness since launch among ICT diagnostic recipients. 77% of survey respondents who had received a diagnostic 0-10 months before completing the survey were satisfied with the process overall, compared to 61% who had received a diagnostic 10-months before. Similarly, 81% now agree they are better informed about using technology in their business (62% previously) and 72% now confident they are using the right technologies for their business (62% previously).

14. Comments from depth interviews underline the value and benefit of the ICT diagnostic, and how this has improved over time.

Funded projects

15. It is too early to assess the full impact of projects on tourism businesses funded within DTBF. However, amongst the 15 grant recipients surveyed who had received a grant prior to December 18th 2012, the grant process was viewed positively.

16. There was positivity towards the funding in general, and its role in developing the digital tourism offer in Wales. Businesses who had received funding elsewhere in the past, unanimously rated the DTBF experience as better.

17. Satisfaction was centred on the role of DTBF staff in facilitating the process. 12/15 respondents to the online survey were satisfied with support overall; 11/15 were satisfied with monitoring; 12/15 were satisfied with the guidance they received.

18. Satisfaction with the feasibility study process (7/11 satisfied) was stronger than for the full project application (1/5 satisfied).

19. As with ICT diagnostics report, there was clear evidence that satisfaction with the project had improved over time; in depth interviews the 'new' application process was particularly well received in comparison to the 'old' application process.

20. Suggestions for improvement of the process include a more streamlined guidance pack for the claims process, more sharing of best practice with other successful grantees, and more support on marketing.

Marketing

21. Reduced resources and difficulty overcoming processes have been barriers to the Visit Wales marketing team implementing some of their designated programme streams. However, positive progress has been made in a number of areas.

22. The new Visit Wales website will launch in 2013. At the launch of the website there will be 80,000 words, 500 images and 200 maps, all tagged to personalise content to feed in to Create Once Publish Everywhere (COPE) approach ensuring images are shared across the web. The Visit Wales website is built on a new content management system (CMS) which is used to display words, pictures and videos. On launch the website will be a unique offer amongst similar organisations.

23. The 'search and social' stream of the DTBF programme has enabled Visit Wales to increase search visibility to the current website. To date, projects have been completed to target under-represented and poorly ranked niche subject areas. Website visits have increased from 1,222,078 at the start of the project to 1,630,323 in 2012 – an increase of 410,245 during a very competitive period for digital destination marketing.

24. www.sharewales.com has 253 members and 2383 shareable photos which have been used to source image results for Visit Wales' current and future website, and for a number of campaign emails. Images are credited back to the owner via a link. It is still early days for the website, although 22% of all diagnostic report recipients up until August 2012 had visited the site (against a target of 15%). Moving forwards the site needs to revaluate its focus and responsibility for promoting the site needs to be assigned.

25. The remainder of the DTBF marketing streams have been hindered by diminished resource, reduced senior input and unexpected permissions and process compared to the start of the project. Despite this, each stream is progressing and the likely success of the new website will provide added momentum.

General

26. Overall, the mid-term evaluation indicates that the DTBF programme has been a success and is on course to meet its longer terms aims and objectives.

1 Aims and objectives of the DTBF programme

Introduction

1.1 The overarching vision of the Digital Tourism Business Framework (DTBF) programme is to move Wales' tourism sector from relative e-business immaturity firmly into the digital business age by the end of 2014. The DTBF programme is funded by the European Regional Development Fund (ERDF) to assist tourism businesses in Wales' convergence areas.

1.2 The programme provides a suite of enabling initiatives that will support the tourism industry to be more conversant in the use of Information and Communication Technologies (ICT), better able to promote itself and to provide a better experience for the visitor. The programme seeks to assist tourism businesses to adopt and develop new technologies. As a result, the aim is for the tourism industry in Wales will be better equipped, through the emerging use of collaborative ICT, to generate, share and distribute tourism content. Tourism businesses will be able to provide potential visitors with the information they require to make a decision and to visit Wales. This will result in performance gains and enhanced competitiveness through innovative communities, projects, ICT awareness and maturity.

Areas of activity

1.3 There are three areas of intervention /activity within the programme:

- ICT diagnostics – the support offered to businesses through training and consultancy advice to businesses on beneficial ICT improvements

- grant funding – available to individuals or groups to deliver improved business performance through new ICT developments for tourism
- all Wales digital marketing activities relating to the creation, development and use of the new Visit Wales website and marketing techniques

Targets and indicators

1.4 The long-term aim of the DTBF programme in order to help achieve its vision is to improve the usage of ICT by the tourism sector in Wales. This aligns with the long-term outcome that by the end of 2014, the tourism sector in Wales will be more conversant in the use of ICT for business promotion, and provide a better experience for the visitor.

1.5 To facilitate this vision, the DTBF programme has a number of targets set by the Welsh European Funding Office (WEFO).

Table 1.1 DTBF programme targets and indicators

Indicator	Target
Enterprises assisted (ICT diagnostics)	750
Enterprises financially supported (competitive grants)	50
New or improved products, processes or services launched	406
Initiatives addressing barriers to ICT uptake	5
DTBF SMEs at Step 3 or progressed one step of e-business maturity ladder (see appendix 1)	12.5%
DTBF SMEs using www.sharewales.com	15%

Mid-term evaluation

1.6 A key requirement of the ERDF is that a mid-term evaluation is carried out to assess the performance of the programme against its objectives. The aim of the mid-term evaluation is to conduct a comprehensive review of the DTBF programme, its activity and its achievements to date and to identify recommendations for taking the programme forward. As

well as evaluating the objectives and the overall business plan activity, there is a need to capture the added value of the programme activity to date and its broader influence and secondary benefits.

1.7 The objectives of this mid-term evaluation are to:

- Review and analyse the existing monitoring and feedback data, identify a sample (drawing upon the business database & existing monitoring data) and conduct the primary research required for the mid-term evaluation.

1.8 This evaluation also considers the programme in relation to the criteria outlined by the Welsh European Funding Office (WEFO) and measures also include:

- Understanding progress towards the projects long-term objectives
- A review of the provision of support against the needs identified by the enterprises assisted
- Integration with other support to businesses, including the number of referrals to other structural funds projects
- The quality of the projects with businesses undertaken to date (in delivering the desired economic impacts and structural change)
- Review the appropriateness of the project indicators and targets;
- Consider how the project is contributing to the cross-cutting themes (equal opportunities and environmental sustainability)[1]
- Identify progress towards an exit strategy;
- Consider legacy impacts, including the extent to which the project has contributed to structural and sustained impact on the targeted sectors and businesses.

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[1] For further guidance see:
http://wefo.wales.gov.uk/publications/guidance/crosscutting/;jsessionid=61698ADFBEA590620A32A1C7CBCF6773?lang=en

1.9   As well as meeting the requirements outlined by WEFO questions, the mid-term evaluation has also considered:

- What has been done by the programme and how has this been understood by those involved?
- How has the programme been delivered and what outcomes have been achieved?
- What barriers and constraints has the programme faced?
- What are participants gaining from the programme and how is this different from what they would have done anyway?
- Are the objectives of the programme being met?
- What recommendations based on evidence can be made for taking the project forward?

2 Methodology

Overview

2.1 As outlined in the aims and objectives section (chapter 1), there are three main areas of activity included in the DTBF programme:

- ICT diagnostics – the support offered to businesses through training and consultancy
- grant funding – available to individuals or groups to deliver improved business performance through new ICT developments for tourism
- all Wales digital marketing activities relating to the creation, development and use of the new Visit Wales website.

2.2 A summary of the methodology used to evaluate each activity is outlined below. The research instruments (questionnaires, topic guides etc.) can be found in the appendices at the end of this report.

ICT Diagnostic

2.3 The mid-term evaluation of enterprises assisted by the ICT diagnostics was divided into three phases of research.

2.4 In the first phase, all 183 enterprises who had received an ICT diagnostic by August 2012 were invited by the DTBF project team to take part in an online survey that asked them to provide feedback on their experience with the process. They were invited to take part in the survey by email but were also notified of the evaluation by post. A total of 142 completed responses were received (141 online and one postal) giving an overall response rate of 78%. Responses to the survey were data-processed, tabulated and analysed by BDRC Continental, an independent research company who were commissioned to conduct the evaluation.

2.5   The second phase of the research was made up of 30 semi-structured qualitative depth interviews amongst a selection of the 142 respondents to the online questionnaire in February/March 2013. A semi-structured depth interview is a loosely scripted conversation with the aim of drawing out the wider implications of individuals' opinions. Respondents' responses to the online questionnaire were fed into the interviews. Interviews were representative of DTBF regions (North, West and South), business type, step on e-business maturity ladder and satisfaction with the whole ICT diagnostic process (according to the online questionnaire). Audio recordings were transcribed and content was analysed.

2.6   The third phase of this research stream consisted of a further 10 depth telephone interviews to individuals who had received an ICT diagnostic recipients from September 2012 to December 2012. These individuals had not been invited to take part in the online questionnaire, and interviews adopted a more hybrid quantitative/qualitative style. Interviews were representative according to region and step on the e-business maturity ladder.

Funded projects

2.7   The mid-term evaluation of enterprises that were financially supported was split into two separate streams of research.

2.8   As with the evaluation of ICT Diagnostics, recipients of funding were initially invited to take part in an online survey that asked for feedback on the overall funding process. 16 enterprises were invited to take part of which 15 returned completed a questionnaire; a response rate of 93%. The responses were processed and analysed by BDRC Continental.

2.9   The second phase of research amongst funded projects consisted of 10 depth semi-structured telephone interviews amongst the recipients of funding. The interviewing sample was sampled according to project

status (feasibility or full) and to whether they were involved in the 'new' or 'old' application process. Loose regional quotas were applied where possible, although any quotas were restricted by limited sample. Audio recordings were transcribed and content was analysed to draw out key themes and understanding.

Marketing

2.10 The majority of understanding on the marketing streams of the DTBF programme was drawn from 2 depth telephone interviews amongst key post holders in the Visit Wales marketing team.

2.11 www.sharewales.com was discussed amongst the recipients of ICT diagnostics as well as the wider DTBF team.

General and context

2.12 Throughout the evaluation, BDRC Continental maintained regular contact with the DTBF team, feeding through key findings and obtaining feedback on areas of confusion or contention.

2.13 Three telephone depth interviews were also conducted amongst the DTBF project's three regional strategists, who provided valuable insight and perspective into early project conclusions.

3   DTBF programme progress to date.

WEFO targets and indicators

3.1   Table 3.1 overleaf illustrates the DTBF programme's progress towards its specific targets and indicators.

3.2   The mid-term evaluation reveals good progress towards volume targets for SMEs supported by ICT diagnostics and grants.

3.3   The target for the implementation of 'products, processes, or services launched' appears to have been exceeded based on only 183 out of a target of 750 assisted enterprises. It is worth noting that this measure was self-assessed by enterprises and further investigation needs to be done to verify its validity.

3.4   The project is currently developing initiatives that address barriers to uptake of ICT and this will be reported in the final evaluation.

3.5   'Step progress' has also significantly exceeded targets, but as with implementation of new products, assessment was self-designated by businesses and current figures are provisional.

3.6   Despite limited marketing and a need for interface development, use of www.sharewales.com has exceeded targets and expectations.

3.7   The progress of the DTBF programme against targets is a reflection of the success of the project. However, the level to which targets have been exceeded (at least provisionally) suggest that targets for implementing new products, step progress and use of www.sharewales.com should be increased by the project end.

Table 3.1 DTBF programme progress against targets and indicators

Indicator	Target	Progress	Notes
Enterprises assisted (ICT diagnostics)	750	569	Completed or in progress (April 2013)
Enterprises financially supported (competitive grants)	50	33	Unique businesses supported (April 2013) (44 competitive grants have been issued in total)
New or improved products, processes or services launched	406	439	Based on 183 businesses receiving ICT diagnostic by August 2012. *N.B. Self-assessed by business. Needs verification by DTBF team*
Initiatives addressing barriers to ICT uptake	5	TBC on completion	
DTBF SMEs at Step 3 or progressed one step of e-business maturity ladder (see appendix 1)	12.5%	75% at step 3 54% moved up a level	Based on 'self-diagnosis'. Will need verification by DTBF team
DTBF SMEs using www.sharewales.com	15%	22% (ever visited website)	Based on 183 businesses in August 2012

Cross-cutting themes

Equal opportunities

3.8 Although the DTBF programme is not required to collect data against specific cross-cutting theme (CCT) indicators, all ERDF projects are expected to demonstrate how they have engaged with CCTs on a more general basis. There are a number of relevant CCT targets which this programme can help promote:

3.9 ICT diagnostic reports point recipients in the direction of best practice in terms of equality issues in their business and in their use of ICT. Almost all businesses (97%) had read their diagnostic report at least once and around two-thirds had done so more than once.

3.10 www.sharewales.com (used by 22% of ICT diagnostic recipients) points recipients in the direction of best practice in terms of equality issues in their business and in their use of ICT.

3.11 All printed materials in the DTBF are bilingual. www.sharewales.com is not yet available in Welsh, but fact sheets have been translated in readiness. Videos have, where possible, been filmed to reflect the Welsh language.

3.12 www.sharewales.com disseminates learning in an open and welcoming manner with the aim of spanning geographical and social divides. This is illustrated by other organisations using it as a model to generate their own materials. The share Wales philosophy of a digital ecosystem – and the Flickr site in particular - utilises a free, open source platform that is open to all to join and share

3.13 The ICT diagnostic is available to any tourism business who meets funding criteria. Information is freely available on the Welsh Government website and www.sharewales.com through wider dissemination.

3.14 All personnel recruitment has been undertaken according to Welsh Government recruitment guidelines.

3.15 The DTBF programme delivers ICT support to tourism businesses of all descriptions across the convergence area. It encourages joint/cross working, both at project level and in the communities. It also directs to other support (such as broadband schemes) as appropriate.

3.16 The project supports tourism businesses in giving them access to wider markets and encouraging them to improve accessibility e.g. through more accessible website.

Environmental sustainability

3.17 ICT diagnostics point recipients in the direction of best practice in terms of green practices in their businesses and in their use of ICT. www.sharewales.com has a specific section on sustainability and points towards relevant support sites.

3.18 The DTBF programme has allowed for the development of tools that ensure the most efficient travel to their businesses or other tourism destinations, to reduce environmental impact. Improved provision of ICT facilities at businesses (such as free Wi-Fi) have reduced the need for customers to travel elsewhere to obtain information.

3.19 ICT diagnostic consultants were selected according to the regions within which they live to minimise travel and impact on the environment.

3.20 There was recognition of the environmental benefits of the project amongst recipients of funding:

> 'There is certainly an environmental benefit to it in terms of being able to plan.'

> 'I think the study has come up with a range of very good ideas which cover not just the digital project but also include things like environmental and cultural improvements.'

4   ICT diagnostics

Summary

4.1   The ICT diagnostic is a free health check of businesses' use of ICT. It is available to businesses that independently attract tourists, are within the European definition of a Small Medium Enterprise (SME) and are in the Wales 65% convergence area.

4.2   The research below was conducted amongst the 142 respondents of the online survey who had received an ICT diagnostic by August 2012 and 40 participants in a telephone depth survey amongst businesses who had received a diagnostic up until December 2012.

Key findings

4.3   69% of businesses who completed the online survey stated they are satisfied with the overall diagnostic process; 21% 'very satisfied' and 48% 'satisfied'.

Chart 4.1 Overall satisfaction with ICT diagnostic
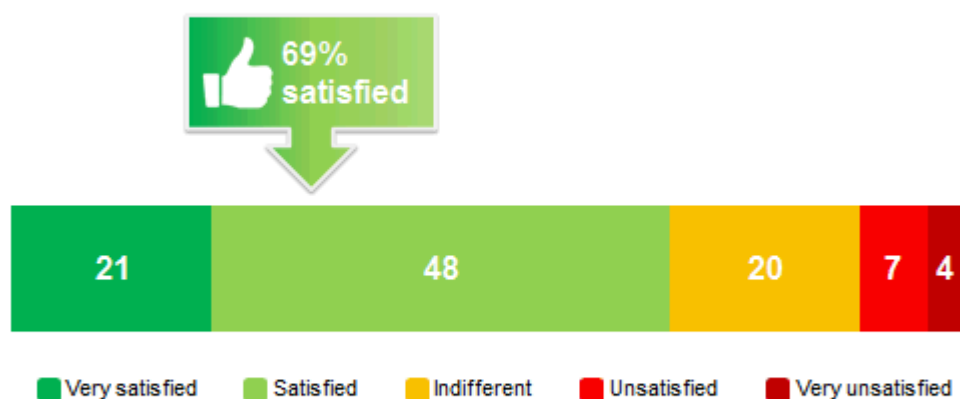
69% satisfied

| 21 | 48 | 20 | 7 | 4 |

■ Very satisfied   ■ Satisfied   ■ Indifferent   ■ Unsatisfied   ■ Very unsatisfied

Q20. Overall, how would you rate your satisfaction with the ICT Diagnostic process?
Base: All respondents n = 138

4.4 Satisfaction was developed in the depth interviews, businesses highlighting that the diagnostic was a positive and enlightening process.

> 'I have developed my business so much as a result of the diagnostic. I had no idea what to do before but with the help of the consultant I now do.'

> 'The whole ICT diagnostic process was great. It exceeded my expectations.'

4.5 After the initial meeting with a DTBF consultant, businesses were designated a 'step' on the 'e-Business Maturity Step Ladder'. The 'step' describes the level of ICT advancement of a business; for example 'step 1' denotes a business with 'low Level IT use in the business' and 'step 5' a 'fully networked e-business' (please see Appendix 1 for a more detailed illustration).

4.6 The chart overleaf illustrates the distribution of step allocations to businesses by consultants (ladder on the left-hand side of the chart) and where businesses positioned themselves when responding to the online questionnaire (ladder on the right).

4.7 Businesses' 'self-designation' is a provisional measure of ICT development, and 'consultant confirmation' will be necessary to validate these findings. However, as illustrated in the chart below, there is at the very least a positive perception shift in ICT capabilities. Three quarters of businesses (75%) positioned themselves as Step 3 or above post-ICT diagnostic compared to just a quarter (25%) pre-diagnostic. 54% of businesses moved at least one step up the ladder as a result of the ICT diagnostic.

Chart 4.2 Position on e-business maturity ladder
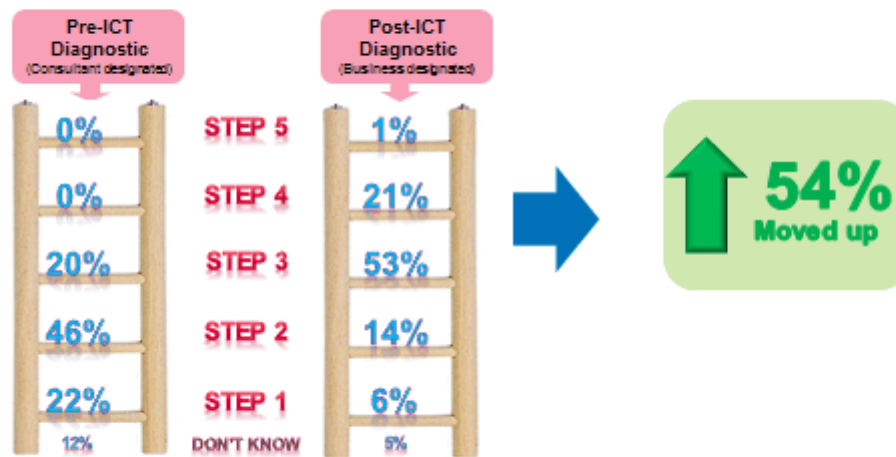
Q17. Where do you think your business now sits on the e-business maturity ladder?
Base: All who answered n=142. Note: Movement calculated amongst all businesses who had an original step designated n=131

4.8 Around 4 in 5 businesses (78%) implemented at least one of the recommendations made in their ICT diagnostic report. On average, each business implemented 2.4 recommendations. Applying this average to all 183 businesses that had received a diagnostic at the time of the survey (August 2012), a total of 439 new or improved recommendations had been launched by the time of the survey. It should be noted that this figure is a product of 'business self-assessment' and will need to be verified by a consultant before the DTBF project is complete.

Chart 4.3 Uptake of recommendations
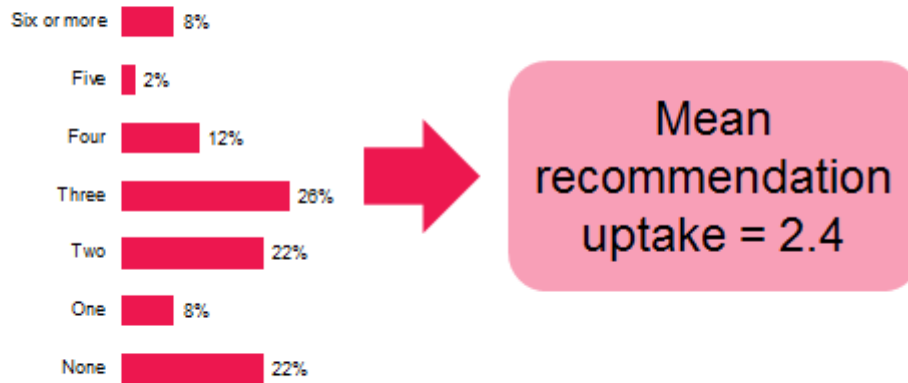
Six or more 8%
Five 2%
Four 12%
Three 26%
Two 22%
One 8%
None 22%

Mean recommendation uptake = 2.4

4.9 70% of businesses implemented a recommendation that improved an already existing element of their ICT offer. Businesses were most likely to have improved their website (54% having done this), followed by their social media offer (30%), internet advertising (26%) and security (23%).

4.10 53% of all businesses implemented a new recommendation, 32% through creating a social media offer.

Chart 4.4 Breakdown of recommendation uptake
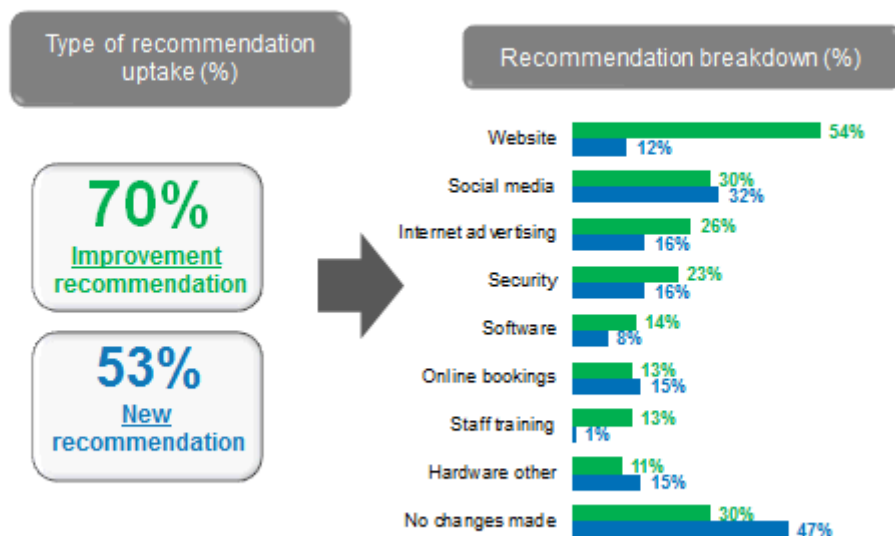
Type of recommendation uptake (%)

Recommendation breakdown (%)

70% Improvement recommendation

53% New recommendation

	Improvement	New
Website	54%	12%
Social media	30%	32%
Internet advertising	26%	16%
Security	23%	16%
Software	14%	8%
Online bookings	13%	15%
Staff training	13%	1%
Hardware other	11%	15%
No changes made	30%	47%

4.11 The vast majority of businesses (88%) had thought about implementing ICT changes prior to receiving their ICT diagnostic. Importantly, for around 4 in 5 of these businesses (79%), the ICT diagnostic made it easier and quicker to implement changes.

Chart 4.5 Role of ICT diagnostic

Did ICT diagnostic make it easier and quicker to implement changes? (%)

88%
Had thought about changes prior to receiving the ICT Diagnostic

79 YES

16 NO
6 DON'T KNOW

Q9. Had you already thought about making any of these ICT related changes/improvements prior to receiving your ICT Diagnostic?
Q10. Did the ICT Diagnostic mean that you were able to make these ICT related changes/improvements more easily and quickly than originally planned 'All answer'
Base: Q9: All who had consulted diagnostic report at least once n = 116
Base: Q10: All who had thought about changes prior to receiving diagnostic n = 99

4.12 For many, the ICT diagnostic provided an opportunity they either would not have had the resources to pay for, or would not have understood the benefits enough to commit finances to.

'As a small business starting out, I don't have spare money for things like this.'

'If I had known how useful it would be, I would have been happy to pay for it. But I wouldn't have paid beforehand, because I would not have realised how much good it would have done me.'

4.13 The ICT diagnostic has led to in an increase in physical and online visitor numbers for businesses. Around 1 in 10 (9%) 'definitely' and around 1 in 3 (34%) 'possibly' attributed changes in their visitor numbers to the ICT diagnostic.

Chart 4.6 Impact of ICT diagnostic on visitors
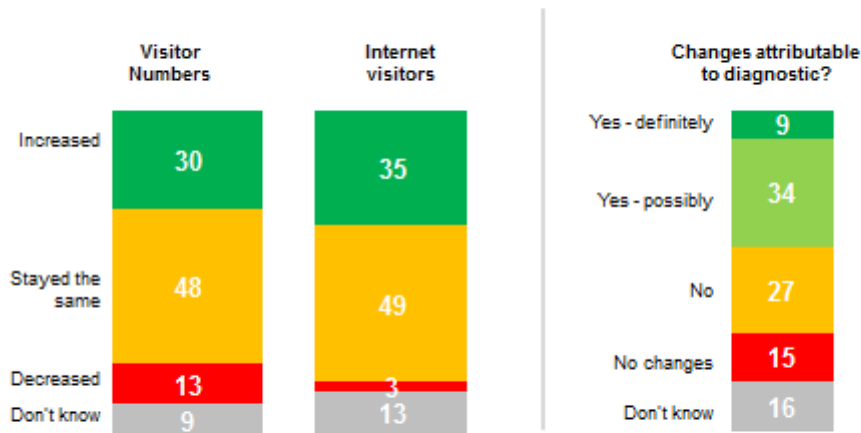
Q12/13 Do you think that the percentage of visitors you get generally/via the Internet has changed since the time of your ICT Diagnostic

Q11 Would you attribute any of these changes to the actions taken following the recommendations of your ICT Diagnostic

Base: Q12/13 All respondents n=142

Base Q11: All who had consulted report more than once n=116

4.14 The extent of the impact on visitor numbers was outlined in the depth interviews, and reference was also made to the positive change in visitor demographics.

> 'The visitor numbers have gone up three-fold because I now have access to bookings online. To this time of year there is probably an increase of 30-40 per cent'

> 'We have more younger customers now. We also have more business and high-end users. I would say we have attracted more visitors through using digital methods.'

4.15 Businesses that had not witnessed a rise in visitor numbers stated that the ICT diagnostic had offset the negative impact of the recession

> 'I would say that we have attracted more visitors through using digital methods and this has been offset by the dropping numbers due to the recession.'

The drivers of a positive ICT Diagnostic experience

The ICT Consultant

4.16 A strong relationship with the consultant who conducted the initial ICT assessment with the business and a good first impression were important in driving overall satisfaction with the ICT diagnostic process. The majority of businesses that were satisfied overall highlighted the knowledge, efficiency and understanding of the consultant they dealt with.

> 'The consultant was excellent and he had very good knowledge. He was one of those people who knew exactly what they are talking about'

> 'I felt the consultant knew what he was talking about. He was efficient and thorough.'

4.17 Industry knowledge as well as technical knowledge was viewed as important to shaping a positive relationship.

> 'He had good technical knowledge and at the same time, he had good knowledge of the industry.'

> 'I was satisfied because he showed he had industry knowledge and what he pointed out was relative to my business.'

4.18 Hands-on support from the DTBF consultant beyond the initial ICT assessment and the diagnostic report are also important in driving business satisfaction. This was especially pertinent amongst businesses who were lower on the e-maturity step ladder, and needed a higher level of advice and guidance.

> 'The support from the consultant was very good. He has always been there. If I had a problem he would email or phone me.'

> 'The support from the consultant was great. After sending the report he also gave me a follow-up call just to find out how I felt about the report and if I was able to work on it.'

The ICT diagnostic report

4.19 Almost all business (97%) who received an ICT diagnostic report consulted it at least once. Around two thirds of businesses (66%) consulted their report on more than one occasion.

Chart 4.7. Occasions consulted ICT diagnostic report
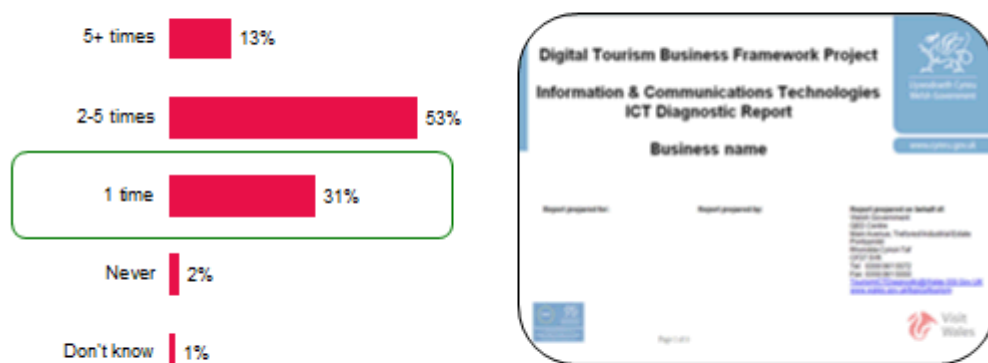
Q7.   How many key steps and/or key opportunities identified by your ICT diagnostic have you implemented
Base: All who answered n=142

4.20 For satisfied businesses, the ICT diagnostic report was regarded as useful, well laid-out and thorough. There was also a general appreciation that it was easy to understand, especially amongst businesses with lower levels of ICT literacy.

> 'The report was very in-depth, very thorough and very useful. The overall elements were excellent.'

> 'It was easily understandable and I think it was aimed at people of my age group.'

4.21 The positioning of key recommendations at the beginning of the report and the use of a 'traffic-light' system to prioritise them was well received amongst satisfied businesses.

> 'I liked the fact that the key recommendations were all upfront so that I could scan them quickly.'

> 'It was nicely laid-out and used different colours to show the importance. I think it was a nice way of representing a report.'

Barriers to a positive ICT diagnostic experience

The ICT consultant

4.22 In much the same way that a positive business-consultant relationship was a driver of satisfaction, a less positive experience with an ICT consultant led to indifference or dissatisfaction with the ICT diagnostic process.

4.23 Businesses that are 'indifferent' or 'dissatisfied' with the process overall (31%) felt that the consultant who assessed them had 'insufficient tourism knowledge' either on a general level, or specific to their type of venue.

'He had good IT knowledge but with regards to tourism, I would say he didn't have anything to offer me that I didn't already know.'

'Industry knowledge of the consultant was poor. All I wanted to know was what people like me are doing. '

4.24 'Lack of support' was also raised as a barrier to satisfaction. For many businesses, the initial assessment and ICT diagnostic report were insufficient for them to implement or understand the recommendations. There was an expressed need for further training or another diagnostic after the report had had time to sink in.

'The initial meeting was useful but it wasn't until afterwards that ideas began to form in my head. A follow-up meeting or training session is definitely necessary to help us implement the recommendations.'

'Personally I think there is a need for another diagnostic now. I wouldn't say we had a good deal of support. Somebody comes out and provides a report and then disappears.'

The ICT diagnostic report

4.25 Indifference or dissatisfaction with the process was also driven by a negative impression of the ICT diagnostic report. Consistent with opinions of consultants, reports that lacked an understanding of the industry or that were not tailored to business needs attracted negativity. A relevant report was key to achieving engagement with the process and ensuring recommendations were implemented.

'The report was highly irrelevant. It was wrong and it was only a cut and paste exercise.'

'The report itself was very stereotypical as if it was an automatic report. It didn't refer to me or my business as an individual. It was not very personal, and it was not applicable to me.'

4.26 Some businesses also felt that their report took longer than expected to arrive. This also led to reduced engagement in the process and a lower likelihood of recommendations being implemented.

'My problem was that it took a long time to get the actual report after my first meeting. The whole process was very long.'

Overcoming barriers and improvements over time

4.27 Anecdotal feedback from businesses together with on-going updates from the mid-term evaluation has allowed the DTBF to address any criticisms of the ICT diagnostic process. Efforts have been made to improve consultants' tourism knowledge, and consultants who have received continued negative feedback have been removed from the project. The report-reviewing process is now shared amongst four members of the DTBF team, having previously been under the remit of just one person. This has ensured that reports are delivered quicker and more efficiently.

4.28 Responses to the mid-term evaluation questionnaire highlight the impact of DTBF efforts to improve the ICT diagnostic process, satisfaction increasing over time. Businesses who had received an ICT diagnostic 0-10 months before responding to the questionnaire were significantly more likely to state they are very satisfied/satisfied than businesses who had received an ICT diagnostic 10-20 months before responding to the questionnaire (77% v 61%).

Chart 4.8. Satisfaction with ICT diagnostic over time
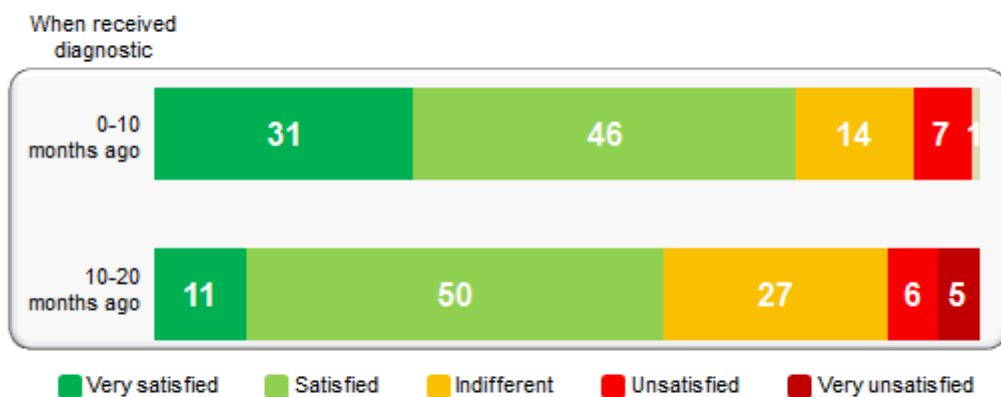
Q20. Overall, how would you rate your satisfaction with the ICT Diagnostic process?
Base: All respondents n = 138

4.29 The two charts below illustrate stronger levels of agreement with all measures over the two time periods. Notably, there was a significant rise in businesses agreeing that 'taking part in the diagnostics process has been a positive process'; 85% stating they strongly agree/agree 0-10 months ago compared to 66% 10-20 months ago.
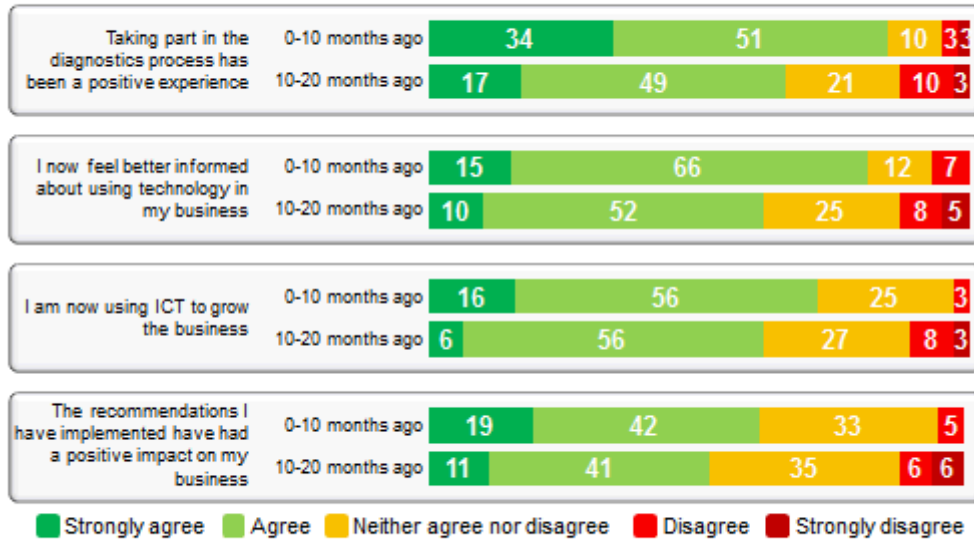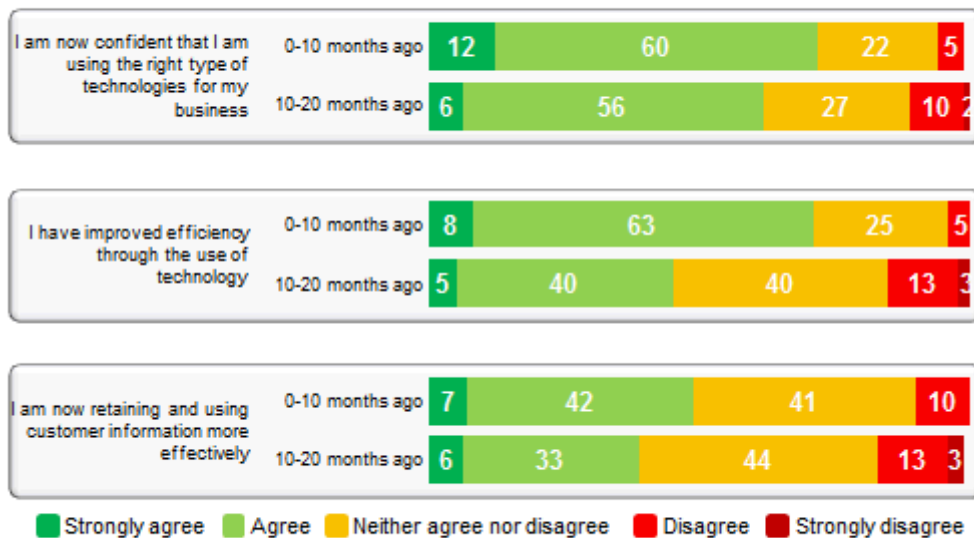
Chart 4.9. Change in business measures over time/1

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Taking part in the diagnostics process has been a positive experience — 0-10 months ago	34	51	10	3	3
Taking part in the diagnostics process has been a positive experience — 10-20 months ago	17	49	21	10	3
I now feel better informed about using technology in my business — 0-10 months ago	15	66	12	7	
I now feel better informed about using technology in my business — 10-20 months ago	10	52	25	8	5
I am now using ICT to grow the business — 0-10 months ago	16	56	25	3	
I am now using ICT to grow the business — 10-20 months ago	6	56	27	8	3
The recommendations I have implemented have had a positive impact on my business — 0-10 months ago	19	42	33	5	
The recommendations I have implemented have had a positive impact on my business — 10-20 months ago	11	41	35	6	6

Q16.   Please rate to what extent you agree or disagree with the following statements which aim to get a sense of your overall experience of the ICTDiagnostics process
Base: All respondents 10-20 months n=63

Chart 4.10 Change in business measures over time/2

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I am now confident that I am using the right type of technologies for my business — 0-10 months ago	12	60	22	5	
I am now confident that I am using the right type of technologies for my business — 10-20 months ago	6	56	27	10	2
I have improved efficiency through the use of technology — 0-10 months ago	8	63	25	5	
I have improved efficiency through the use of technology — 10-20 months ago	5	40	40	13	3
I am now retaining and using customer information more effectively — 0-10 months ago	7	42	41	10	
I am now retaining and using customer information more effectively — 10-20 months ago	6	33	44	13	3

Q16.   Please rate to what extent you agree or disagree with the following statements which aim to get a sense of your overall experience of the ICTDiagnostics process
Base: All respondents 10-20 months n=63

4.30 The depth interviews conducted after August 2012 further highlight improvements in the diagnostic process over time. Consultant knowledge received a number of positive references.

> 'The consultant was very knowledgeable. He had very good knowledge of technology and of tourism.'

> 'He had very good knowledge of tourism. He seemed to be very knowledgeable in tourism as well as in IT.'

4.31 Similarly, the interviews reflected greater levels of positivity towards the support provided by consultants.

> 'The support from the consultant was very good. He has always been there and if I had any problem I could have phoned him or emailed him.'

> 'The support from the consultant was good. I had all his details to contact him whenever he needed. After sending the report he gave me a follow-up call just to find out how I felt about the report and if I was able to work on it.'

4.32 There was almost universal agreement that the ICT diagnostic report was received promptly. This, in turn, helped to ensure that findings were fresh in recipients' minds.

> 'It took him two weeks to deliver the report which was pretty quick.'

> 'The turnaround from the meeting was just two weeks which is quite good and quick. Because it came within two weeks, it kept things fresh in my mind.'

4.33 Although it is clear that the experience of the ICT diagnostic process has improved over time, evidence from two out of the ten later interviews suggest that more recently, the diagnostic has been provided to businesses did not desire it. As a result, these businesses failed to engage in the process at any point.

Conclusions and recommendations

4.34 A positive business-consultant relationship is essential to driving strong levels of satisfaction with the ICT diagnostic process. It is important that consultants offer strong industry knowledge and are aware of the specific implications of the ICT diagnostic on each business they assess. An increase in reported satisfaction as the project has progressed is directly related to DTBF's efforts to ensure that consultants who fail to meet the required standard are removed from the project, and that the remaining consultants are better-educated on the needs of the tourism industry. Evidence from the latter diagnostics confirms that consultants are now delivering to a high standard on a consistent basis. It is essential that this quality is maintained amongst the remaining diagnostics.

4.35 Feedback on the ICT diagnostic report echoed that of the consultant; satisfaction stronger when the report was bespoke and easy to understand. With a more streamlined consultant pool, this process should fall out naturally and evidence from later diagnostics suggests that this has happened already. It is important that reporting is monitored to guarantee business engagement with the process.

4.36 A number of businesses spontaneously requested they receive further support beyond their initial assessment and report. Some businesses – especially those lower on the e-business maturity ladder – had difficulty understanding the recommendations in the report and needed closer support and guidance to implement them. This then led to disengagement with the process and the abandonment of report and

recommendations. Although provision of support appears to have improved over time, there are still a number of businesses who need extra guidance to implement their recommendations. Can a follow-up diagnostic be offered?

5 Funded projects

Summary

5.1 The DTBF programme seeks to assist tourism businesses and supporting organisations in adopting new technologies that enable them to meet visitor expectations and become more competitive in the market place. To this end the DTBF offers match-funding opportunities to encourage the sector to collaborate digitally to develop communities and sustainable technological solutions. To aid the development of concepts applicants are able to seek Welsh Government support up to the value of £15,000 to undertake a feasibility study.

5.2 The results in this chapter are based on 15 responses to an online survey sent to recipients of funding up until December 2012, and 10 depth telephone interviews amongst the same audience. Interviews were split between feasibilities studies (8) and full projects (2). To measure the development of the application process, feasibility study interviews were split between the 'new' and 'old' process. The flow charts below illustrate the difference between the two.

Chart 5.1 Change in process for funding applications
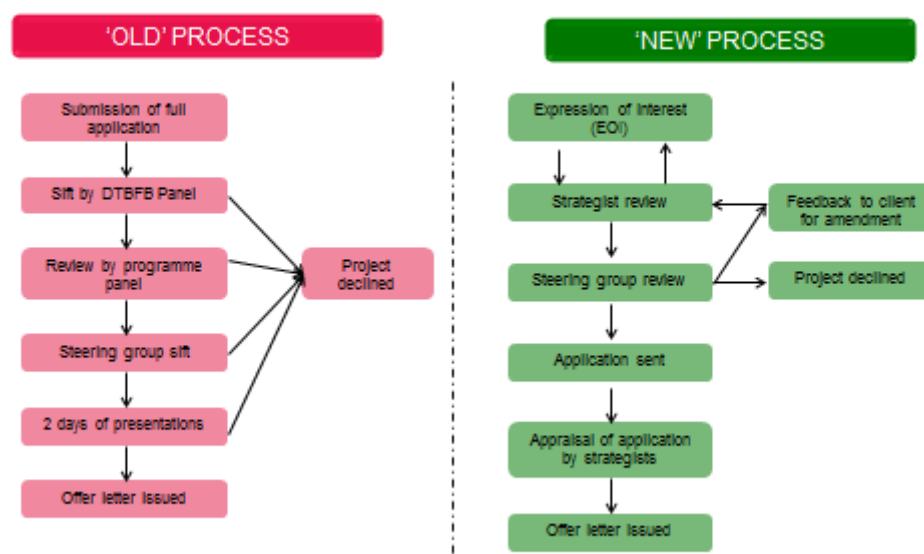
Key findings

5.3   8 out of 10 businesses from the depth telephones interviews were satisfied with the overall funding process. Satisfaction was driven by the opportunity the funding gave to investigate and develop concepts as well as the overarching benefits to Welsh tourism on the whole.

> 'It provided the financial backing to develop a product at concept stage and that was extremely valuable for us.'

> 'It has really helped me to bring to life a project that I really believe will benefit tourism in Wales.'

5.4   DTBF strategists echoed this positivity and the benefit of the funding to the Welsh tourism industry.

> 'The funded projects have allowed for experimentation and growth opportunities in areas that otherwise would have been potentially barren of digital media.'

> 'The tourism business has gained an insight into previously untapped market exposure and alternate product delivery options.

5.5   There was recognition from the majority of businesses that without funding they would not have had the means or motivations to carry out the projects.

> 'Without the Visit Wales funding I would not have carried out the work at all. I think it was a mechanism that allowed us to approach this project in a way for which there wasn't any mechanism available.'

'I would not have carried out the work had we not had the financial backing of Visit Wales – I don't think there are other sources we could have got hold of.'

5.6   A number of businesses had previous experience of applying for funding elsewhere. There was a consensus amongst these businesses that applying for funding with Visit Wales was an easier and more straightforward process. There was recognition that Visit Wales staff had worked to make the application process as easy as possible.

'Visit Wales was much, much more straightforward than others. I know I said something about the form but other applications for European funding were really difficult in comparison.'

'European funding was a lot more complicated and time-consuming. I think it basically comes down to the fact that Visit Wales has already done that for us.'

Drivers of a positive funding application experience

5.7   Aside from the benefits of the outputs of funding, the support provided by Visit Wales was also a driver of business satisfaction. The majority who responded to the online questionnaire (12 out of 15) were satisfied with the support they received from DTBF staff overall, driven by their positivity with the monitoring of their project (11/15 satisfied) and the guidance they received throughout (12/15 satisfied).

Chart 5.2 Satisfaction with support with funding process
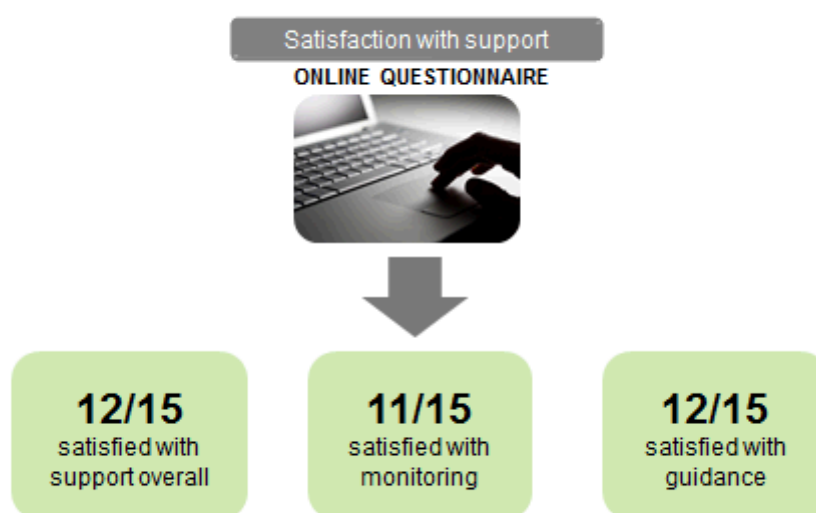
Source: Online funded project questionnaire; depth interviews

5.8   The depth interviews further emphasised the importance of the support provided by Visit Wales staff. There was specific mention of the strategists, particularly with regards to their responsiveness and flexibility. Other staff were also mentioned positively. There was also recognition that DTBF staff endeavoured to make a difficult process more manageable.

> 'His knowledge was very complete and he was easy to deal with.'

> 'All the people I dealt with are excellent. They are very good people'

'We had an issue but Visit Wales staff were very responsive. They fixed the problem so have nothing to answer for.'

'The people on board at Visit Wales did their best to try and make the project as successful as they could in terms of support.'

Barriers to a positive funding experience

The application process

5.9 The feasibility application received a number of negative comments from businesses involved in the 'old process.'

5.10 Criticisms were centred on the application form; some saying that they didn't regard it to be user-friendly or relevant to their application. There were also criticisms of the time it took for decision making after the submission of the application.

'The application form was awful. You can't add tables or diagrams or anything else.'

'I think it was the application form from some other grant system. Effectively they didn't design a pertinent form'.

'It took longer than I would have hoped for. You don't want to see it going anywhere else especially as you've gone out to a lot of people and told them about it.'

5.11 There was also some negativity towards the application for full project status; 1 out 5 respondents stating they were satisfied overall.

The claims process

5.12 Businesses were required to claim back the costs incurred in undertaking the feasibility study after its completion. The process received negative comment from the majority of respondents to the online process. Criticisms were centred on the 'excessive' level of detail required and the lack of pre-information they had been given at the start of the project. There was also a feeling that the process was not bespoke to their projects.

> 'The claims process was excessive and ridiculous. The people doing it were fine, it's not the people. It actually cost us more to claim the grant than it did our tax'

> 'There was very little information about how we were going to claim the money back.'

> 'We spent a lot of time preparing forms and trying to prepare the claim form in a way we thought was correct only to send the documentation in and be told that a load of things were wrong and needed to be redone. It has been a very laborious process.'

5.13 There was also a concern amongst one respondent that the application process was not designed to accept truly innovative projects and, as a result, potentially exciting projects had not been accepted.

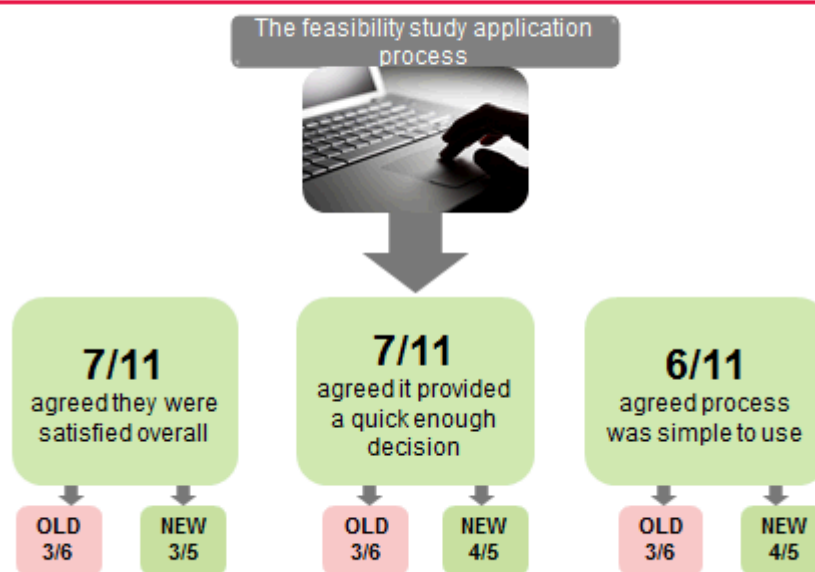> 'It was a great opportunity to finance some great ideas that were probably not going to be able to see the light of day without the finance. I just wonder how many ideas were lost because they were unwilling to take the risk.'

5.14 As stated by the DTBF project team, the focus away from truly innovative projects was a conscious decision because of low interest in this area when funding applications were opened.

Overcoming barriers and changes over time

5.15 Both the online questionnaire and depth telephone interviews clearly demonstrate an improved perception of the application process as the project progressed. As shown in the illustration below, satisfaction with the 'new process' was higher than with the 'old process', as was agreement that the process provided a quick enough decision and that it was simple to use.

Chart 5.3 Satisfaction with feasibility study application process

The depth interviews develop this response. The introduction of strategist influence was also noted. It is clear that the revised approach has been well-received.

'It wasn't a particularly onerous process so I am fairly satisfied.'

'How quick it was? It was fine.'

'Strategists were not involved when we started and it was nice to have them on board when they joined – someone that you can call up and run things by.'

5.16 There was also recognition that the claims process had improved. Businesses were more aware of the requirements at an earlier stage and guidance to complete the forms made the process more manageable.

5.17 An overarching development and positive learning from the funding process was that the rigorous application and claims processes has developed businesses' organisational capabilities and has better prepared them for similar procedures in the future.

Conclusions and recommendations

5.18 It is clear that as with the ICT diagnostic projects, the role of Visit Wales staff is essential to driving satisfaction with the process. Despite challenging processes and procedures, the flexibility, responsiveness and all round support provided by the DTBF project team generated a positive experience. It is important that this is maintained in future and existing projects

5.19 The claims process remains a challenge for businesses. This is in part a result of business resource or under-developed organisational culture, but also a consequence of insufficient understanding of what detail is required until after the money has been spent. The DTBF project team have made concerted efforts to improve the claims procedure and this has been recognised by applicants. However, the research suggests that more needs to be done to signpost the detail that is needed at an earlier stage. Suggestions include a more simplified guidance pack and a timesheet for scheduling.

5.20 A number of businesses interviewed declared an appetite for sharing the data that emerged from feasibility studies or adopting a more collaborative approach with businesses that had similar ideas

'I know some of the businesses involved were willing to have their information shared and to work collaboratively with others if that opportunity arose. I don't think that was actively explored.'

'Sharing best practice would definitely be beneficial.'

With this in mind, perhaps more can be done to ensure that, where relevant ideas and data are shared. Successful grantees could be announced to the wider community allowing them to approach one another independently.

5.21 There was a feeling amongst some businesses that more could have been done to help them effectively market their product. Whilst funding was only awarded to businesses that demonstrated a sustainable business plan, marketing was conveyed as an area where they needed extra support.

'The problem is that most people with innovative ideas are not the best marketers. I think we are one of them that can come up with good ideas but to develop and roll out a marketing strategy is not in our skillset.'

5.22 Visit Wales' role is not to be a marketing advisory department and businesses need to take the responsibility for developing marketing strategies themselves. However, Visit Wales do run road shows on how tourism businesses can promote their offering and also a number of collaborative opportunities. There was limited awareness of this amongst businesses. Perhaps more can be done to signpost this support? As the natural link between business and marketing, this would be a role best suited to the strategist's.

6   Marketing activity

Summary

6.1   The third strand of the DTBF programme involves the Visit Wales marketing team implementing some of their designated streams. A summary is listed below:

- ecosystem development – New Visit Wales website
- ecosystem development – Share Wales website
- open platform - The infrastructure on which we create and manage the Visit Wales website
- knowledge base; search and social - Creating demand for Wales tourism products. Helping Visit Wales appear in search results (e.g. Google) for the kind of searches customers are making
- knowledge base PR - A website developed in order to share Wales tourism information with journalists only
- knowledge base digital trade initiative - A funding scheme to encourage on line travel trade businesses to develop and promote rich content about Wales within their digital marketing
- knowledge base eCRM - the database of visitors and potential visitors to Wales. The purpose of the eCRM programme is to encourage recipients to visit Wales, or to stay longer/do more/spend more money in Wales if they are already intending to visit
- technology database - A customer database used to communicate with potential visitors to Wales.

Progress to date

Ecosystem development – Share Wales

6.2 www.sharewales.com is a base for content ecosystem work as well as an area that enables other strands of DTBF to have an online presence. The 'share content' section of the website is a comprehensive section that outlines the methods that tourism providers can engage with the content ecosystem. The explainer section of the website includes three videos in English and Welsh instructing businesses on how to share their content. The website is also the platform for a Flickr group which to date has 253 members and 2383 shareable photos which have been used to source images for Visit Wales' current and future website and for a number of campaign emails. Images are credited back to the source owner via a link.

6.3 22% of respondents to the ICT diagnostic online survey had visited www.sharewales.com (against a target of 15%), although only 2% of respondents agreed that they use the site regularly.

6.4 In the ICT diagnostic telephone depths, awareness of www.sharewales.com was low, suggesting more can be done to promote it as a resource to these businesses.

6.5 Internally it was felt that that website lacks clarity on the benefits it offers and it is difficult to understand exactly what it is trying to achieve. The marketing department felt that it had become a dumping ground for various ideas and it lacks purpose as a result.

6.6 There was universal internal negativity towards the forum on the share wales website. Strategists believed that it had developed into a platform for businesses to share their ideals rather than to share their best practice, a place for businesses to consume rather than share information.

6.7 Moving forward, it is felt that it is important to perfect the product before promoting it to the wider market. It is important to be clear exactly what the website is trying to achieve and for this to be translated into key benefits for the end user. The website should reflect its purpose and in a simplified, user-friendly interface.

6.8 Interviews amongst members of the marketing team suggested that responsibility for promoting the website had fallen through the cracks and that it needs to become a part of someone's job description if it is to be developed moving forward.

6.9 It is clear that www.sharewales.com has the potential to be a valuable resource for individuals who seek evidence of what similar businesses are doing or for whom ICT literacy is low and further support is needed.

Ecosystem development – Visit Wales website

6.10 The new Visit Wales website will launch on May 20th 2013. At the launch of the website there will be 80,000 words, 500 images and 200 maps. All of these will be tagged to enable the personalisation of content and will be part of the COPE (Create Once, Publish Everywhere) approach ensuring images are shared across the web. There have been some delays in the development of the website namely due to process and the procurement of a new Content Management System (CMS) – Site Core - but these barriers have been overcome and launch is imminent.

6.11 Despite the difficulties of process and gaining permissions, the Visit Wales marketing team are overwhelmingly positive about the product and cite it as unique in the UK tourism offer

> 'It's going to be fantastic, fingers crossed; it will be one of the first of its kind. For a tourism organisation like a Visit Scotland,

Visit England, we're probably ahead because we're one of the only ones in Britain to have a completely adaptive website.'

Open platform

6.12 The open platform is the infrastructure that is used to create the Visit Wales website. There are two key elements to it; the CMS - SiteCore; and the cloud-hosting solution - Rackspace.

6.13 SiteCore is used to display words, pictures and videos. It enables close integration with other social media that promotes Wales as a holiday destination. Rackspace provides a mixed Windows and Linux cloud-hosting solution on which SiteCore resides which is elastic and scalable on demand. SiteCore was configured in February 2012 and Rackspace has been in use since August 2012. The technology underlies the digital ecosystem and will pull in, display or export over 10,000 items of product data as content.

Knowledge base – search and social

6.14 The aim of 'search and social' is to increase search visibility to ensure Wales is a holiday destination for a larger audience and to increase visibility for Welsh tourism providers through content placement and on-site accommodation, attractions, activities and event-search facilities. Through creating this demand it will increase spend in the Welsh visitor economy.

6.15 To date, projects have been completed to target under-represented, and poorly ranked niche subject areas such as 'romantic breaks' and 'city breaks'. Exploration work has been undertaken into paid search advert placements to make Visit Wales visible for competitive searches but also to gauge traffic levels for keywords.

6.16 Website visits have increased from 1,220,078 when the contract was put in place in 2009 to 1,630,323 in 2012 – an increase of 410,245 during a very competitive period for digital destination marketing.

6.17 'Search and social' is integral to the successful promotion of the new Visit Wales website and is evidently working well in achieving its aims

Technology database

6.18 The technology database is up and running and plays a key role in communicating on line with our customers and, therefore, distributing rich content.

Knowledge base PR, knowledge base digital trade initiative and knowledge base eCRM

6.19 The remaining marketing streams of the DTBF programme are progressing but have been delayed by resource and process (please see below for a more complete explanation).

6.20 There is no evidence to suggest that any of these streams should be removed from the programme.

Barriers to progress

Permissions and process

6.21 Before becoming fully integrated into the Welsh Government, the Visit Wales marketing department was a semi-independent organisation called the Welsh Tourist Board. In its former guise, the marketing department had a high level of autonomy and flexibility. In becoming part of the Welsh Government, the department lost a large degree of its independence and became subject to Welsh Government's processes and procedures.

6.22 Interviews amongst post holders in the Visit Wales marketing department highlight the significant challenge of adapting to Welsh Government processes, and the negative impact this had on the progress of DTBF streams within their remit. Processes ranged from gaining basic understanding of a concept to procurement of new systems and project implementation.

> 'It has taken us more time, largely because we've needed to seek permissions, achieve agreement, understanding, before we could even get to the point where we were procuring it' (Visit Wales marketing team)

> 'The biggest problem for us has been the projects that we really wanted to move on have been delayed and have been much harder work to put in place than we probably ever pre-empted.' (Visit Wales marketing team)

6.23 Processes have challenged the majority of DTBF streams within the marketing team's remit, most notably with the procurement of the new CMS for the new Visit Wales website, obtaining clearance for the digital trade initiative and demonstrating the effectiveness of new cloud-hosting technologies.

Resources

6.24 A further barrier for the Visit Wales marketing team is the loss of staff resource as the project has progressed. As a result of redundancies within the department, the staffing situation at the time of this research was significantly different to the project's inception.

6.25 The most obvious impact has been a reduction in 'manpower' to dedicate to each project stream. This has had the consequence of targets not being met as scheduled.

6.26 A further barrier to progress has been a reduction in the level of senior management input. When the DTBF project commenced, it had significant support from senior management but over time these individuals have been lost to the organisation. Replacements have been less closely engaged with the project (having not been involved at the start), resulting in a reduction in senior input to push through processes and maintain momentum.

6.27 The reduction in resources has had the indirect effect of members of the marketing department becoming less involved with the day to day running of the marketing streams of the DTBF project and consequently, with the progress of the project on the whole.

Changes over time

6.28 The cultural disparity between the Visit Wales marketing department and the rest of the DTBF team has faded as the project has progressed. The marketing department now have a better understanding of the processes and clearances required to implement new systems. Further, the required new systems (such as CMS) are already in place.

6.29 Importantly, despite barriers to success, the majority of marketing streams are in progress or have been fully implemented.

Conclusions and recommendations

6.30 Resource remains the outstanding issue in ensuring the continued progress of marketing streams within the DTBF project. Added support to the team would act as a positive catalyst in ensuring remaining targets and timings are met. There is also a declared need for awareness and input at a more senior management level to add momentum and energy to various streams.

6.31 The indirect consequence of stretched resources is that members of the marketing team have become less involved – and engaged - with the project. This has led to reduced understanding in the overall project's direction – specifically in steering group meetings. To confirm the future success of marketing streams within the project, it is essential that the marketing team regain representation at steering group meetings and ensure communication with the rest of the DTBF team is maintained for the remainder of the project.

6.32 The new Visit Wales website will be launched in 2013. In conjunction with 'search and social' the marketing team are confident that it will be a success, describing it as 'one of its kind.' The website has been a staging point for a number of 'procurement and permissions battles' and it should be used as a platform to demonstrate the positive work of the marketing team and the logic of their determination in the use of new CMS and cloud-hosting system.

7 Overall conclusions

7.1 The mid-term evaluation clearly demonstrates that the DTBF programme is progressing towards its long-term vision of moving Wales out of relative e-business immaturity and firmly into the digital business age by the end of 2014.

7.2 The ICT diagnostics have engineered an improvement in ICT capabilities amongst SMEs who would not have developed their digital offer without the support and guidance the diagnostics provided. Feedback from businesses has been predominantly positive and the majority of ERDF targets have been exceeded (although subject to verification).

7.3 Funded projects are providing businesses with opportunities that otherwise would not have been available, and in areas that – prior to the DTBF programme – were barren of digital media. Satisfaction with the funding process is almost universal and improvements in application procedures have ensured satisfaction has increased as the project has progressed. Visit Wales staff were recognised for facilitating a smooth process, and businesses who had applied for funding elsewhere rated this experience more positively.

7.4 The majority of marketing initiatives are progressing, and the new Visit Wales website is set to invigorate the user experience for potential visitors to Wales. www.sharewales.com has had good exposure; improvements to the site and better promotion will ensure its influence grows further.

7.5 There have been a number of challenges across all three activity streams, but the majority of these have been overcome as the project has progressed and there is quantified evidence of the project improving over time.

7.6   The bulk of recommendations for the remainder of the DTBF programme are that the project team continue to perform well in the areas that are driving positive results and experiences. Other recommendations include increased support (ICT diagnostics), a more succinct claims guidance pack (funded projects) and better communication between separate strands of the team (marketing projects).

7.7   On top of various reporting procedures, recommendations from the mid-term evaluation have been fed to the DTBF project team as and when they have emerged in the research. As such the project team are already working to implement them and in some cases have already done so.

7.8   This mid-term evaluation confirms that longer term objectives should be met by the DTBF programme, and Wales' digital tourism capabilities will continue to improve towards the end of 2014.

Appendix 1 – e-business maturity step ladder

Step 1 – Low Level IT use in the business - You may have a computer with basic software, with office packages email etc., which you use as and when, along with phone, and potentially fax, mobile etc., to get jobs done. You possibly have a static web page – maybe on others site, but feel more comfortable using other forms of promotion/adverts to sell the business. Potentially providing some limited guest access to IT. You may be a reluctant user, be unsure what ICT could do for you or where to start with it all. Potentially not sure what steps you need to take to secure your business with regards IT

Step 2 – Passive user of IT in the business - You have standard computer/s, software and telephones etc. and are fairly comfortable using standard office packages. You use the web for gathering information and are aware what competitors are doing and others are saying about your business. You may even dabble with social media. You have an accessible business website with registered domain name - and are visible in the global market, but don't yet take bookings / take payments through it, but may get third party booking agency/agencies to do this. You may give a degree of access to IT products to customers. You think there is potential to do more with IT and have possibly undertaken some related training, but need some guidance on how to move forward or reassurance that you are moving in the right direction and whether what you have is secure from e-crime or misuse

Step 3 – Proactive in your Business IT use - You're a confident IT user maximising your accessibility to new markets including managing and regularly updating your web content. You have E Commerce Capability - buying and selling goods and services over the internet and taking reservations/payment on-line, and / or if you are using third party booking agent/s, you are determining how best/when to use. You probably manage what people say about your business on consumer sites and you may be engaging in social media for business purposes. You are sharing good news

stories with those promoting Wales Tourist offering. You regularly up-date your knowledge on IT developments/use but perhaps feel that you are not maximising/best linking the different tools that you use in an integrated way.

Step 4 – Confident E Business - With ICT firmly integrated / embedded and maximised in all aspects of the business, you have an ICT policy that takes in sustainability issues and all aspects of the business, with strategies aligned and with appropriately linked equipment, software, telecoms etc. You have fully integrated Customer Relations Management systems and supply chains and you are realising cost benefits. You are registered/contributing to DM Wales and on top of e-security issues (e-crime, customer use and disaster-continuity). You are now looking at how you might integrate with others - developing community interactions with other providers, looking to innovative uses of ICT and sharing ICT knowledge for wider benefit

Step 5 – Fully Networked E Businesses - Digital Ecosystem - You operate virtual enterprises and are engaged in ICT Best practice. There is natural selection and evolution among services and solutions in the business and a dynamic aggregation of offers across it. You probably have business models based on inter-organisational networking. You are an exemplar to the tourism business in Wales, representing Welsh Business and sharing your knowledge (presenting as a case study, possibly involved in training) and active in Destination Management issues/creating the buzz at the local, Wales and hopefully wider World level.

Appendix 2 – Research instruments. ICT Diagnostics

ICT diagnostics online questionnaire script

CODING SCHEDULE

[ICT DIAGNOSTICS - ONLINE QUESTIONNAIRE]

Thank you for logging onto this Digital Tourism Monitoring & Feedback Questionnaire. The questions in this monitoring & feedback questionnaire seek to establish whether you have implemented any changes in the business use of ICT since the diagnostic and whether you feel this has been beneficial to the business. We recognise that you might have already answered some similar questions at an earlier stage, but we seek here to get a snapshot of any changes.

This is a short online questionnaire that you can complete in your own time at your own pace. It should take no more than 10 minutes of your time.

You should be able to complete all of the questions without referring to documentation other than your ICT Diagnostics report. If, however, you wish to refer to your original application and your report and are unable to find these, please contact the team on 0300 061 5504 and we will be happy to supply.

To complete the questionnaire, simply follow the on screen instructions. Please try and answer each question as accurately and honestly as possible, you will have an opportunity to share any further feedback at the end of the questionnaire.

Please be aware that this questionnaire is part of a wider mid term evaluation process and that you may be contacted at a later date by a research team to discuss your views and experiences in more depth. Please note that the mid term evaluation is being conducted by an independent research company (rather than the project team) to give an independent perspective, and therefore your answers to this questionnaire will be made available to them for further analysis. All data gathered from this questionnaire will be made anonymous before publication of any results. The data received will be stored on a secure network and data protection procedures are in place. Please note that by completing this questionnaire you are consenting that your responses can be used in the evaluations of the DTBFP and any subsequent publications.

Please ensure that you consult the information sheet attached to the email this survey link was sent in before taking part, and if you have any further questions then please do not hesitate to contact the team on 0300 061 5504.

Thank you

99 = NOT APPLICABLE
PAGE 1 (all)
This section seeks to verify the business details. We need to collect this information to ensure that the monitoring requirements associated with the provision of the ICT Diagnostic service are being met as we are required by the funders to collate certain information on each business which received an ICT Diagnostic. Your business name or your name, however, will not be published in conjunction with any individual results from this questionnaire.

1. Please state the unique reference number you have been given in your invitation email/letter.
   [open ended]

2. What is the name of your business?
   [Open ended]

3. What is your name and job title?
   [open ended]

PAGE 2 (all)

Now we want to find out if you have acted on the suggestions given by the diagnostic consultant and if not, why not.

4. Approximately, how long ago did you receive your ICT Diagnostic visit?
   a. More than 20 months 1
   b. 15-20months 2
   c. 10-15 months 3
   d. 5-10 months 4
   e. 0-5 months 5
   f. I don't remember 6

The Diagnostic service has developed as it has progressed and report styles differ. If you were part of the initial Trial Phase (from March 2011) your report is probably text heavy in an A4 portrait layout and while Recommendations may be highlighted near the beginning you may find the Opportunities are detailed through the Report. Those who received their reports after the Live Scheme, started in September 2011 should have a landscape table MOT style report with Key Opportunities and Key Steps to secure the business clearly highlighted at the front of the report.

5. Following the visit from the ICT Diagnostic consultant you should have received a complete ICT Diagnostics report which outlined details of the recommendations and improvements suggested for your business.

Other than for the purposes of completing this questionnaire today, have you consulted this report?
- a. Yes – more than 5 times 1
- b. Yes – between 2 and 5 times 2
- c. Yes – 1 time 3
- d. No I have never looked at the report 4
- e. I don't know 5

6. Have you implemented any of the 'key opportunities' and/or 'key steps' advised by your ICT Diagnostic?
- a. Yes – all of them 1
- b. Yes – some of them 2
- c. None of them 3
- d. I don't know 4

Page 3 (routed)

Routed (only see q 7, 8 9 ,if ticked a or b to q5)

7. How many key steps and/or key opportunities identified by your ICT diagnostic have you implemented? (please state a number)
[open ended]

8. Please select which categories below best describe the recommendations (key opportunities/key steps) you have implemented. Please also identify whether this was a 'new' recommendation or an 'improvement'

      1 = TICKED   0 = NOT TICKED

	New	Improvement	
Website *(e.g. website accessibility, improvements etc)*			
Online bookings/sales *(e.g. online payments etc)*			
Internet advertising/marketing *(e.g. review sites, video channels, email marketing etc)*			
social media *(e.g. creation of facebook/twitter account etc)*			
software (*e.g. systematic data collection programme, system updates etc)*			
hardware (e.g. *new computer purchase, USB storage purchase etc*)			
security *(e.g. limiting*			

access to WIFI network, back ups, security software etc)			
staff training (*e.g. training staff on IT usage etc*)			
Other			

9. Had you already thought about making any of these ICT related changes/improvements prior to receiving your ICT Diagnostic?
   a. Yes all of them 1
   b. Yes some of them 2
   c. None of them 3
   d. I don't know 4

(Routed – only if a,b (YES) to q9)

10. Did the ICT Diagnostic mean that you were able to make these ICT related changes/improvements more easily and quickly than originally planned?
    a. Yes 1
    b. No 2
    c. I don't know 3

(routed to those who say yes a,b to q5)

11. If you have noted any changes to your visitor numbers and/or types of visitors, would you attribute any of these changes to the actions taken following the recommendations of your ICT Diagnostic?
    a. Yes definitely 1
    b. Yes possibly 2
    c. No 3
    d. I don't know 4
    e. I haven't noticed any changes 5

ALL

12. Do you think that the percentage of visitors you get via the internet has changed since the time of your ICT Diagnostic?
    a. Increased 1
    b. Stayed the same 2
    c. Decreased 3
    d. I don't know 4

13. Overall, do you think that visitor numbers have increased or decreased as a result of actions since the time of your ICT Diagnostic?
    a. Increased 1
    b. Stayed the same 2
    c. Decreased 3
    d. I don't know 4

14. Do you think that the demographic type of your visitors (e.g. who visits, how long they visit/stay etc) has changed since the time of your ICT Diagnostic?"

      a) Yes I have noticed a considerable change 1
      b) Yes I have noticed some change 2
      c) No I haven't noticed any change 3
      d) I don't know 4

Routed (only see if said no or don't know to q6)

15. If you have not implemented any of the 'key opportunities' and/or 'key steps' advised in your ICT Diagnostics report, what was the main reason? (please select the most relevant answer)
      a. Too complicated 1
      b. Haven't had enough time/not enough staff resources 2
      c. Not enough money 3
      d. Didn't agree with them/ didn't see the benefits 4
      e. I intend to but haven't got round to it yet 5
      f. Other 6
          i. Please specify [open ended]

(all)

16. Please rate to what extent you agree or disagree with the following statements which aim to get a sense of your overall experience of the ICT Diagnostics process:

		Strongly Agree	Agree	Neither agree/dis	Disagree	Strongly disagree
A	I now feel better informed about using technology in the business	1	2	3	4	5
B	I am now confident that I am using the right type of technologies for my business	1	2	3	4	5
C	I am now using ICT to grow the business	1	2	3	4	5
D	I have improved efficiency through the use of technology	1	2	3	4	5
E	I am now retaining and using customer information more effectively	1	2	3	4	5
F	I would be prepared to pay a fee for a similar service in the future	1	2	3	4	5
G	Taking part in the diagnostics process has been a positive experience	1	2	3	4	5
H	The recommendations I have implemented have had a positive impact on my business	1	2	3	4	5

(all)

17.   The consultant who reported on your business will have indicated where he felt you sat on our E Business Maturity Step Ladder towards the front of your report. Where do you think your business <u>now</u> sits on the ladder?

Step 5 - Fully Networked E Businesses - Digital Ecosystem	1
Step 4 - Confident E Business	2
Step 3 - Proactive in your Business IT use	3
Step 2 - Passive user of IT in the business	4
Step 1 - Low Level IT use in the business	5
I don't know	6

(all)

Sharewales.com is the website of the Digital Tourism Business Framework Programme - providing resources to support better understanding of the use of technology in the tourism sector and helping tourism businesses in Wales to maximise the opportunities of the digital age - sharing learning, knowledge and content.

18. Have you ever visited the sharewales website?
a) yes 1
b) no 2
c) I don't know 3

(routed to those who tick yes to q18)
> 19. Please rate how far you agree or disagree with the following statements:

		Strongly Agree	Agree	Neither agree/dis	Disagree	Strongly disagree
A	I use the ShareWales website on a regular basis	1	2	3	4	5
B	The ShareWales website is a useful resource	1	2	3	4	5

All

20. Overall, how would you rate your satisfaction with the ICT Diagnostic process?
a) very unsatisfied 1
b) unsatisfied 2
c) indifferent 3
d) satisfied 4
e) very satisfied 5

The service has improved and the wider project has developed thanks to the constructive inputs we have received to date. We value your feedback. Thank you.

21. In a sentence what would you now tell other businesses like yours - either about the service, or about developing the use of IT that we could use in marketing materials
 [open ended - limit]

22. If you have any other comments related to any actions you have taken from the diagnostic, about the ICT Diagnostics experience, or regarding issues relating to this questionnaire, please use the comments box below.
[open ended]

Final Page

Thank you very much for taking part in this questionnaire, you input is extremely valuable. The project team take your comments and concerns seriously, so if you have any issue which you would like to raise then please contact them on 0300 061 5504.

Please remember that there is lots of further information and resources on the ShareWales website http://www.sharewales.com/

**Telephone depth recruitment and discussion guide
(online survey sample)**

You recently completed an online questionnaire to give feedback on the Free Tourism ICT Health Check you received from Visit Wales. As part of the mid-term evaluation of the project, Visit Wales have commissioned ourselves, BDRC Continental, to undertake some in-depth and independent analysis of your responses. As part of this research we are conducting a series of telephone interviews to better understand the reasons behind your responses and to gain a more detailed picture of your overall satisfaction. You should have received an email off Visit Wales in the last week or so to confirm this.

You have been selected to take part in one of these interviews at a time of your convenience. The interview will take between 20 to 30 minutes depending on the length of your responses. All of your feedback will be made anonymous and will only be used for the purposes of the research.

Q1.   Firstly, can I check that you personally completed the online questionnaire?
      (IF NO, PLEASE ASK TO SPEAK TO THE RELEVANT PERSON; OR FOR THEIR CONTACT DETAILS. THERE WERE A COUPLE OF PAPER COPIES COMPLETED)

Q2. When would it be convenient to call you to conduct the interview? **(MAKE APPOINTMENT)**

If possible can you take another look at the diagnostic report before the phone call. We will need to double check how many steps of opportunities you have implemented for auditing purposes, so if you could have this information handy that would be much appreciated.

INTERVIEWER: IF NECESSARY: If you would like more information on the research please contact Jon Young at BDRC Continental on 0207 400 1010. If you would like to confirm the validity of the research please contact the Digital Tourism team on 0300 061 5504.

THANK AND CLOSE

RESPONDENT DETAILS

INTRODUCTION

Thank you for agreeing to take part in the mid-term evaluation of Visit Wales' Digital Tourism Business Framework Project. Please be aware that your responses will be recorded for analysis purposes only. BDRC Continental adheres to the MRS Code of Conduct and will only be used for the purposes of the research. Your responses will be anonymous and Visit Wales will not be able to identify their source.

The interview is semi-structured and is based on the responses you gave to the online questionnaire.   If, at any point in the interview, you feel like adding any information you feel will aid our analysis please do so.

GENERAL

(INTERVIEWER: PURPOSE OF Q1 IS TO TAKE RESPONDENT BACK TO START OF THE PROJECT – TO CONTEXTUALISE THE QUESTION.
INTERVIEWER: PLEASE PUSH TO GET EARLY THOUGHTS – PROBE WITH SPECIFIC AIMS, BUSINESS OUTCOMES, IMPROVEMENTS IF NO ANSWERS ARE FORTHCOMING)

1. I would like you to take a moment to think back to when you were first offered a free ICT diagnostic and to when you first made the application.
   a. Forgetting the process and the outputs, do you remember what you aimed to achieve from the project? Can you very briefly describe your aims at the time?
   b. Thinking back to these aims at the start of the project and now to the end of the process after you have received your diagnostic, how do you feel the process/outcome compared to your expectations?

IF REPONSE GIVEN IN COLUMN M

2. You stated that you were <INSERT SATISFACTION RESPONSE IN COLUMN M> with the ICT diagnostic process.

    a. Why do you say this? (PROBE)

    b. And what would you say are the main reasons? (PROBE)

IF NO REPONSE (E.G. '0') GIVEN IN COLUMN M

3. Overall, how satisfied were you with the ICT diagnostic process.

    a. Why do you say this? (PROBE)

    b. And what would you say are the main reasons? (PROBE)

4. Would you have been as satisfied had you had to pay for the report? Why?

INTERVIEWER: IF NOT GIVEN ABOVE…

5. And how satisfied were you with the overall elements of the project?

    a. The industry knowledge of the consultant you dealt with

    b. The time taken to deliver the report

    c. The report format and content

    d. The support you received throughout

    e. The position assigned to you from the E-business maturity ladder. You were assigned <INSERT STEP FROM COLUMN N>

    f. And how satisfied were you with the overall elements of the project?

Key steps and opportunities

Now a few questions about the key steps and opportunities identified in your ICT diagnostic.

6. When we booked the appointment we asked you to check how many key steps and/or key opportunities identified by your ICT diagnostic you have implemented. Did you check this? If so, how many?

7. Which, key opportunities have you implemented? Why were these prioritised?

    ASK FOR EACH STEP. PROMPT WITH…

        i. Ease/difficulty to implement

        ii. Time

        iii. Finances

        iv. Benefit to business

8. Which recommended opportunities didn't you implement? Why have these not been implemented?

> **ASK FOR EACH STEP. PROMPT WITH…**
>> i.   Not a priority
>> ii. Ease/difficulty to implement/did not understand them/need more support
>> iii. Time
>> iv. Finances
>> v.   Benefit to business

> b. What could have been done differently to ensure you implemented these steps?

INTERVIEWER: ONLY ASK IF RESPONDED 'YES, DEFINITELY' OR 'YES, POSSIBLY' AT COLUMN Q AND/OR 'INCREASED' AT COLUMN R ON ONLINE QUESTIONNAIRE (HIGHLIGHTED YELLOW IN DATABSE)

9. In the online questionnaire you stated that the ICT diagnostic report has had an impact on your visitor numbers. In what way has it had an impact?

INTERVIEWER: ONLY ASK IF RESPONDED 'CONSIDERABLE CHANGE' OR 'SOME CHANGE' AT COLUMN S ON ONLINE QUESTIONNAIRE (HIGHLIGHTED IN GREEN ON DATABASE)

10. You stated that you have noticed <INSERT RESPONSE AT COLUMN S> in the demographic type of your visitors since your ICT diagnostic. How do you think this has changed?

ASK ALL. CHECK ROUTING FOR a or b
11. Now thinking about your business on the whole, you stated that you <INSERT RESPONSE TO column T> that the recommendations have had a positive impact on your business

> a. (IF STRONGLY AGREE/AGREE)   How have the recommendations impacted positively on your business? And how else?
> b. (IF NEITHER AGREE/DISAGREE/STRONGLY DISAGREE) Why don't you think they have had a positive impact on your business? What could have been done differently?

INTERVIEWER: ONLY ASK IF 'GONE UP' AT COLUMN E (HIGHLIGHTED IN PURPLE)

12. In the online questionnaire you placed your business as <INSERT RESPONSE FROM Q17 COLUMN O> on the e business maturity step ladder which is higher than the stage given by your consultant. What specific changes do you feel have been made that move you up the ladder?

ASK ALL

13. What, if any, new technologies, or innovative ICT approaches are you now taking beyond the recommendations of the diagnostic?

<u>SHAREWALES</u>

Finally some questions about the sharewales website (www.sharewales.com)

14. You said that you <HAVE/HAVE NOT VISITED (SEE COLUMN U)> the sharewales website.
    c. (IF HAVE VISITED). What are your opinions of the website?
    d. How do you think it could be made more accessible?
    e. (IF HAVEN'T VISITED). What do you think is included on the website?
    f. Why haven't you visited sharewales so far? **(IF RESPONSE IS ' NOT HAD TIME', PROBE FOR MORE ANSWERS)**
    g. What do you think could be done to make your business and businesses like yours visit the sharewales website?

15. That's all the questions I have for now. Is there anything else you would like to add on either the diagnostics report or the sharewales website?

THANK AND CLOSE

Telephone depth recruitment and discussion guide
(non-online survey sample)

INTRODUCE: Calling from BDRC Continental on behalf of Visit Wales.

You recently received an email informing you that we would like you to take part in an online survey about your free Tourism ICT Health Check that you received from Visit Wales.

Visit Wales are obliged to conduct a mid-term evaluation of the project and have commissioned ourselves, BDRC Continental, to undertake some in-depth and independent analysis of the whole ICT process. The research will take the form of telephone interviews with the aim of understanding your satisfaction with the process overall and the individual constituents within in. You should have received an email off Visit Wales in the last week or so to confirm this.

(**INTERVIEWER: IF NECESSARY)**: If you would like more information on the research please contact Jon Young at BDRC Continental on 0207 400 1010. If you would like to confirm the validity of the research please contact the Digital Tourism team on 0300 061 5504.

You have been selected to take part in one of these interviews at a time of your convenience. The interview will take between 30 to 40 minutes depending on the length of your responses. All of your feedback will be made anonymous and will only be used for the purposes of the research.

Q1.   Would you be willing to take part in the interview?

Q2.   When would it be convenient to call you to conduct the interview? **(MAKE APPOINTMENT)**

Can you take another look at the diagnostic report before the phone call. We will need to double check how many steps of opportunities you have implemented for auditing purposes, so if you could have this information handy that would be much appreciated.

THANK AND CLOSE

RESPONDENT DETAILS

INTRODUCTION

Thank you for agreeing to take part in the mid-term evaluation of Visit Wales' Digital Tourism Business Framework Project. Please be aware that your responses will be recorded but this is for analysis purposes only. BDRC Continental adheres to the MRS Code of Conduct and responses will only be used for the purposes of the research. Your responses will be anonymous and Visit Wales will not be able to identify their source.

The interview is semi-structured. If, at any point in the interview, you feel like adding any information you feel will aid our analysis please do so.

GENERAL

(INTERVIEWER: PURPOSE OF Q1 IS TO TAKE RESPONDENT BACK TO START OF THE PROJECT – TO CONTEXTUALISE THE QUESTION.
INTERVIEWER: PLEASE PUSH TO GET EARLY THOUGHTS – PROBE WITH SPECIFIC AIMS, BUSINESS OUTCOMES, IMPROVEMENTS IF NO ANSWERS ARE FORTHCOMING)

16. I would like you to think back to when you were first offered a free ICT diagnostic and to when you first made the application.
    a. Forgetting the process and the outputs, do you remember what you aimed to achieve from the diagnostic? Can you very briefly describe your aims at the time?
    b. Thinking back to these aims at the start of the project and now to the end of the process after you have received your diagnostic, how do you feel the process/outcome compared to your expectations?

IF REPONSE GIVEN IN COLUMN M

17. From the following options, how would you rate your satisfaction with the ICT Diagnostic Process?

      i. Very unsatisfied

      ii. Unsatisfied

      iii. Indifferent

      iv. Satisfied

      v. Very satisfied

    b. Why do you say this? **(PROBE)**

    c. And what would you say are the main reasons? **(PROBE)**

18. Using the same satisfaction scale, how satisfied do you feel you would be had you had to pay for the report? Why do you say this?

INTERVIEWER: IF AREA NOT DISCUSSED ABOVE…

19. And how satisfied were you with the overall elements of the project?

    g. The tourism knowledge of the consultant you dealt with

    h. The time taken to deliver the report

    i. The report format and content

    j. The support you received throughout

    k. The position assigned to you from the E-business maturity ladder. You were assigned **<INSERT STEP >**

    l. And how satisfied were you with the overall elements of the project?

Key steps and opportunities

Now a few questions about the key steps and opportunities identified in your ICT diagnostic.

20. When we booked the appointment we asked you to check how many key steps and/or key opportunities identified by your ICT diagnostic you have implemented. Did you check this? If so, how many have you implemented? **(IF UNSURE, ASK TO LIST)**

21. **(IF ANY IDENTIFIED AT Q5 ABOVE)** And of those that were identified is that…
    a. All of them
    b. Some of them
    c. Don't know

(IF ANY IDENTIFIED AT Q5 ABOVE)

22. Which specific key steps/opportunities have you implemented? Why were these prioritised?
    ASK FOR EACH STEP. PROMPT WITH…
        i. Ease/difficulty to implement
        ii. Time
        iii. Finances
        iv. Benefit to business

23. Which recommended steps/opportunities didn't you implement? Why have these not been implemented?
    ASK FOR EACH STEP. PROMPT WITH…
        vi. Not a priority
        vii. Ease/difficulty to implement/did not understand them/need more support
        viii. Time
        ix. Finances
        x. Benefit to business
    c. What could have been done differently to ensure you implemented these opportunities?

24. From the following options, how much of an impact has the ICT diagnostic report, and the resulting actions you have taken, had on your visitor numbers?
        i. Increased
        ii. Stayed the same
        iii. Decreased
        iv. Don't know
    b. **(IF CHANGED)** How much have numbers changed?

25. From the following options, do you think the demographic type of your visitors (e.g. who visits in terms of location, age, social group) has changed since the time of your ICT diagnostic?

> i. Yes, I have noticed a considerable change
> ii. Yes, I have noticed some change
> iii. No, I haven't noticed any change
> iv. I don't know

   b. How has this changed?

ASK ALL

26. How much do you agree with the following comments relating to your business? **(INTERVIEWER: READ OUT AGREEMENT SCALE AND GO THROUGH EACH)**

> Strongly agree, Agree, Neither agree/disagree, Disagree, Strongly disagree

   a. **(IF NEITHER AGREE/DISAGREE OR DISAGREE, STRONGLY DISAGREE GIVEN FOR i to vii)** Why do you say this?

> i. I now feel better informed about using technology in the business
> ii. I am now confident that I am using the right type of technologies for my business
> iii. I am now using ICT to grow the business
> iv. I have improved efficiency through the use of technology
> v. I am now retaining and using customer information more effectively
> vi. I would be prepared to pay a fee for a similar service in the future
> vii. Taking part in the diagnostics process has been a positive experience

ONLY ASK IF IMPLEMENTED STEPS/OPPORTUNITIES AT Q5/6

   b. And how much do you agree or disagree the recommendations you have implemented have had a positive impact on your business

   c. **(IF STRONGLY AGREE/AGREE TO 11b)** How have the recommendations impacted positively on your business? And how else?

   d. **(IF NEITHER AGREE/DISAGREE/STRONGLY DISAGREE TO 11b)** Why don't you think they have had a positive impact on your business? What could have been done differently?

27. On your ICT diagnostic report your IT consultant graded you as **<INSERT STEP>** on the e-business maturity ladder. This means **<GIVE DEFINITION** Where would you currently place yourself on the e-business maturity ladder? **<READ OUT DEFINITIONS IN APPENDIX IF NECESSARY>**

    a. **<IF MOVED UP>** What specific changes do you feel have been made that move you up the ladder?

    b. **<IF STAYED THE SAME>** Why do you feel you have not moved up the ladder? What do you think could be done to move you up the ladder?

ASK ALL

28. What, if any, new technologies, or innovative ICT approaches are you now taking/do you plan to take beyond the recommendations of the diagnostic?

SHAREWALES

Finally some questions about the Share Wales website (www.sharewales.com)

29. Have you heard of the Share Wales website?

(IF HEARD OF SHARE WALES WEBSITE - INTERVIEWER TO ASK).

    a. Have you visited the website yet?

    b. **(IF VISITED ASK)**

        i. How much do you agree or disagree that the Share Wales website is useful? **(STRONGLY AGREE, AGREE, NEITHER AGREE NOR DISAGREE, DISAGREE, STRONGLY DISAGREE).** Why do you say that?

    c. **(IF NOT VISITED ASK)**

        i. Why haven't you visited the Share Wales website so far? **(IF RESPONSE IS ' NOT HAD TIME', PROBE FOR MORE ANSWERS)**

        ii. What do you think it is/what might you find on the website?

    d. **(AND WHETHER OR NOT THEY HAVE VISITED ASK)**

        i. What do you think could be done to make your business and businesses like yours visit the Share Wales website?

(IF NOT HEARD OF SHARE WALES WEBSITE - INTERVIEWER READ OUT).

Sharewales.com is the website of the Digital Tourism Business Framework Programme - providing resources to support better understanding of the use of technology in the tourism sector and helping tourism businesses in Wales to maximise the opportunities of the digital age - sharing learning, knowledge and content.

      a. Is this a resource that you think you would find useful? If yes, is it something you would like to contribute to or you would use as a reference?

30. That's all the questions I have for now. Is there anything else you would like to add on either the diagnostics report or the sharewales website?

THANK AND CLOSE

Appendix 3 – Research instruments. Funded projects

Online questionnaire script

**CODING SCHEDULE
[ONLINE QUESTIONNAIRE]**

**Digital Tourism Business Framework Monitoring & Feedback
Questionnaire
Funded Projects**

Thank you for logging onto this questionnaire.

The aim of this questionnaire is to compile information on how we are performing as a programme and if there are any opportunities where we could improve. Therefore, we will be considering these results as part of our wider monitoring and evaluation processes.

This is a short online questionnaire that you can complete in your own time at your own pace. It should take no more than 5 minutes of your time. To complete the questionnaire please follow the on screen instructions. Please try and answer each question as accurately and honestly as possible, you will have an opportunity to share any further feedback at the end of the questionnaire.

Please be aware that this questionnaire is part of a wider mid term evaluation process and that you may be contacted at a later date by researchers to discuss your experiences in more depth. Please note that the mid term evaluation is being conducted by an independent research consultancy (rather than the project team) to give an independent perspective, and therefore your answers to this questionnaire will be made available to them for further analysis.

All data gathered from this questionnaire will be made anonymous before publication of any results. The data received will be stored on a secure network and data protection procedures are in place. Please note that by completing this questionnaire you are consenting that your responses can be used in the evaluations of the DTBFP and any subsequent publications.

If you have any further questions then please do not hesitate to contact the team on 0300 061 5545

99 = NOT APPLICABLE

(ALL)
1. Did you apply for a grant from the Digital Tourism Business Framework following completion of an Expression of Interest?
    a. Yes 1
    b. No 2
    c. Don't know 3

(Routed to those who say YES to q1)
2. Please rate to what extent you agree or disagree with the following statements related to the Expression of Interest (EoI) process:

		Strongly Agree	Agree	Neither agree/dis	Disagree	Strongly disagree
A	The EoI process was simple to use	1	2	3	4	5
B	The EoI process provided a quick enough decision	1	2	3	4	5
C	I was satisfied overall with the EoI process	1	2	3	4	5

(ALL)
3. Did your project begin as a Feasibility Study?
    a. Yes 1
    b. No 2
    c. I don't know 3

(Routed to those who say YES to Q3)
4. Please indicate your experience of the application process for your Feasibility Study by rating to what extent you agree or disagree with the statements below:

		Strongly Agree	Agree	Neither agree/dis	Disagree	Strongly disagree
A	The Feasibility study application process was simple to use	1	2	3	4	5
B	The Feasibility study application process provided a quick enough decision	1	2	3	4	5
D	I was satisfied overall with the Feasibility study application process.	1	2	3	4	5

(ALL)
5. How would you describe your project now?
    a. Feasibility study 1
    b. Innovative Project 2
    c. Digital Community Project 3

6. Please rate to what extent you agree or disagree with the following statements related to your experiences of applying for your Innovative Project or Digital Community Project:

		Strongly Agree	Agree	Neither agree/dis	Disagree	Strongly disagree
A	The application process was simple to use	1	2	3	4	5
B	The application process provided a quick enough decision	1	2	3	4	5
C	I was satisfied overall with the application process	1	2	3	4	5

(ALL)

7. How would you describe the current status of your projects schedule according to your agreed timetable (as it stands at the point of you completing this questionnaire)
   a. Ahead of schedule 1
   b. On schedule 2
   c. Behind schedule 3
   d. On hold 4
   e. I don't know 5

8. Please briefly outline the main reason(s) your project is on hold?
   OPEN ENDED

9. Please briefly outline the main reason(s) your project is behind schedule?
   OPEN ENDED

(ALL)

10. What is the total cost of your project?
    a. Under £4999 1
    b. £5000 - £9999 2
    c. £10,000 - £19,999 3
    d. £20,000 – £29,999 4
    e. £30,000 – £39,999 5
    f. £40,000 - £49,999 6
    g. £50,000 - £59,999 7
    h. £60,000 - £69,999 8
    i. £70,000 - £79,999 9
    j. £80,000 - £89,999 10
    k. £90,000 - £99,999 11
    l. £100,000 - £149,000 12
    m. £150,00 or above 13

11. Do you consider that the level of match funding provided is sufficient to enable you to carry out your project as envisaged?
    a. The funding support has been sufficient to fully carry out the project as envisaged 1
    b. The funding support has been sufficient to mostly carry out the project as envisaged requiring minor adaptations. 2
    c. The funding support has not been sufficient and we have struggled to carry out the project as originally envisaged requiring major adaptations. 3
    d. The funding support has not been sufficient and we have not been able to carry out the project as envisaged at all. 4
    e. I don't know 5

12. How did you find out about the DTBFP fund?
    a. Online 1
    b. Newsletter 2
    c. In person (from DTBFP team member) 3
    d. Referral (from a non-DTBFP team member) 4
    e. Other (please specify) 5

13. Approximately, how long did it take to process your idea from initial enquiry to application submittal?
    a. Less than one month 1
    b. One to two months 2
    c. Two to three months 3
    d. Three to four months 4
    e. More than four months 5

(ALL)
14. Please rate your satisfaction with the support and monitoring of your project by the DTBFP staff

		Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
A	How satisfied or dissatisfied were you with the guidance provided during project meetings?	1	2	3	4	5
B	How satisfied or dissatisfied were you with the monitoring of your project?	1	2	3	4	5
C	How satisfied or dissatisfied were you with the support provided by the DTBFP staff via phone and/or email contact?	1	2	3	4	5

(ALL)
Thank you very much for taking the time to complete this questionnaire. We really value your feedback. If you have any further comments please use the space below:

[open ended comments]

Thank you note (final page)

Telephone recruitment and discussion guide
Digital Tourism Business Framework Project
TeleDepth Recruitment Guide – funded projects

You recently completed an online questionnaire to give feedback on the process you experienced applying for a grant from Visit Wales. As part of the mid-term evaluation of the project, Visit Wales have commissioned ourselves, BDRC Continental, to undertake some in-depth and independent analysis of your responses. As part of this research we are conducting a series of telephone interviews to better understand the reasons behind your responses and to gain a more detailed picture of your overall satisfaction. You should have received an email off Visit Wales in the last couple of weeks to confirm this.

You have been selected to take part in one of these interviews at a time of your convenience. The interview will take between around 30 minutes depending on the length of your responses. All of your feedback will be made anonymous and will only be used for the purposes of the research.

RECRUITER: MUST SPEAK TO NAMES CONTACT

Q1. Firstly, can I check that you were personally involved in the grant application process?
(IF NO, PLEASE ASK TO SPEAK TO THE RELEVANT PERSON; OR FOR THEIR CONTACT DETAILS. THERE WERE A COUPLE OF PAPER COPIES COMPLETED)

Q2. When would it be convenient to call you to conduct the interview? **(MAKE APPOINTMENT)**

We would appreciate if you could refresh your memory with the process before the appointment. We are interested in understanding your satisfaction overall, as well as specific positives and/or negatives in the process. The purpose of the research is to understand what can be improved and what should be kept the same for future applications.

(**RECRUITER: IF NECESSARY**: If you would like more information on the research please contact Jon Young at BDRC Continental on 0207 400 1010. If you would like

to confirm the validity of the research please contact the Digital Tourism team on 0300 061 5504.

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THANK AND CLOSE

MAIN INTERVIEW

RESPONDENT DETAILS

INTRODUCTION

Thank you for agreeing to take part in the mid-term evaluation of Visit Wales' Digital Tourism Business Framework Project. Please be aware that your responses will be recorded but this is for analysis purposes only. BDRC Continental adheres to the MRS Code of Conduct and responses will only be used for the purposes of the research. Your responses will be anonymous and Visit Wales will not be able to identify their source.

The interview is semi-structured. If, at any point in the interview, you feel like adding any information you feel will aid our analysis please do so.

GENERAL

(INTERVIEWER: PURPOSE OF Q1 IS TO TAKE RESPONDENT BACK TO START OF THE PROJECT – TO CONTEXTUALISE THE QUESTION.
INTERVIEWER: PLEASE PUSH TO GET EARLY THOUGHTS – PROBE WITH SPECIFIC AIMS, BUSINESS OUTCOMES, IMPROVEMENTS IF NO ANSWERS ARE FORTHCOMING)

31. Before we commence the interview we would like to ensure we have a complete understanding of your project. The information we have describes the project as follows <INSERT PROJECT DESCRIPTION>. Is this information accurate? Is there anything else that is worth adding?

32. Can I just check what stage your project is currently at? (INTERVIEWER: READ OUT. PLEASE CHECK COLUMN Y TO ENSURE THEY MATCH)
    a. Feasibility study
    b. Full digital community project
    c. Full innovative project

33. I would now like you to think back to the start of the project, to the point just before your initial application or expression of interest.

    a. Forgetting the processes, outputs, or where your project is now, can you briefly describe what your aims and objectives were for the project?

    b. And how do you feel the process has compared to your expectations? (IF BELOW OR ABOVE EXPECTATIONS PROBE WHY)

34. How would you rate your satisfaction with the process overall?

      i. Very unsatisfied

      ii. Unsatisfied

      iii. Indifferent

      iv. Satisfied

      v. Very satisfied

    a. (IF VERY UNSATISFIED/ UNSATISFIED OR INDIFFERENT AT Q4)

      i. Why do you say this?

      ii. What were the main factors?

      iii. Is there anything you think Visit Wales could have done differently to improve the process?

      (INTERVIEWER: PROBE WHETHER NEGATIVES ARE SPECIFIC TO VISIT WALES OR PERSONAL/EXTERNAL/OTHER FACTORS)

      iv. What were the positive elements of the process?

    b. (IF SATISFIED/VERY SATISFIED)

      i. What most impressed you about the process?

      ii. Are there any elements of the process that you are not satisfied with?

(ASK ALL)

35. Which of the following would you have done had you not received an offer for funding from Visit Wales?

      i. Would have sought other sources for funding

      ii. Would have conducted work without other sources of funding

      iii. Would not have carried out the work at all

36. Have you had any dealings with Visit Wales (or the Welsh Tourist Board) in the past? How does this experience compare?

37. Do you have experience of applying for funding/a grant from another source? This can be either in your current capacity or in another capacity.

(IF YES TO 5)

    a. Who did you apply from?

    b. How did the overall process compare to your experience with Visit Wales? (PROBE HOW/WHT IT WAS BETTER OR WORSE)

<u>APPLICATION PROCESS</u>

(NEW PROJECTS ONLY – COLUMN C)

38. I'd now like to touch on some of the specific stages of your application.

    c. At the start of the project you will have completed an 'Expression of Interest' (EoI) form. Can I check that this was actually the case?

(IF COMPLETED AN EoI at Q6 answer b and c)

    (IF NEITHER AGREE NOR DISAGREE AT COLUMN S)

    d. In the online questionnaire you stated you <INSERT FROM COLUMN S> that you were satisfied with the EoI process. Can I check that this is correct? What prevented you from being satisfied? (PROBE SPEED OF DECISION AND SIMPLICITY TO complete EOI)

        i. Probe on liaison with strategist

    (IF STRONGLY AGREE/AGREE AT COLUMN S)

    e. What particularly stood out about the process? Is there anything that could have been done to improve this element of the process?

        i. Probe on liaison with strategist

39. And how would you describe your satisfaction with the process after your EoI was reviewed and accepted?

Probe with…

    ii. Time taken to review application

    iii. Ease of application.

(OLD PROJECTS ONLY - COLUMN C)

40. I'd now like to touch on some of the specific stages of the application process

    a. How satisfied were you with the application process from your original application to your offer letter? (USE SCALE: VERY SATISFIED, SATISFIED, NEITHER SATISFIED NOR DISSATISFIED, DISSATISFIED, VERY DISSATISFIED)

Probe on…

    i. Time taken

    ii. Ease/difficulty to complete

    iii. Stages of the process that were the most difficult (please refresh with review by programme panel, steering group sift, presentation)

    a. What if anything, do you think could have been done differently by Visit Wales to improve the application process?

    b. What, if anything, do you think, they should keep doing?

SUPPORT AND MONITORING

(ASK ALL)

41. Generally speaking how satisfied or dissatisfied are you with your dealings with Visit Wales staff during the process?

Probe on…

    iv. Guidance during project meetings <CHECK COLUMN AK AND FEED IN>

    v. Monitoring of your project <CHECK COLUMN AL AND FEED IN>

    vi. The support you received <CHECK COLUMN AM>

    vii. The tourism/sector knowledge of the staff you dealt with

    viii. Understanding of your business

CURRENT PROJECT STATUS

Now a few questions about the current status of your project

42. In the questionnaire you described your current project status as <INSERT FROM COLUMN AC> because <INSERT COMMENT FROM AD IF IT EXISTS>. Is this still the case? If not, how would you describe it?
    f. Ahead of schedule
    g. On schedule
    h. Behind schedule
    i. On hold

43. (IF BEHIND SCHEDULE) Why? Is there anything Visit Wales could do to help with this?

FULL PROJECTS ONLY

44. Did you have any issues with achieving match funding?
    a. (IF YES) What were they? Is there anything Visit Wales could have done better?

SUMMING UP

45. Are there any other benefits that have come out of the project beyond the scope of the project?
    Prompt with
    a. Social
    b. Economic
    c. Knowledge
    d. Environmental