

Tourism Summit, 6th March 2001

Report from the English Tourism Council

This report has been produced by the English Tourism Council for the Tourism Summit and is in 4 sections. First we briefly set out current trends, second we raise the immediate priorities as we see them, third we outline likely areas of common interest with Government and fourth, we report on the progress of "Tomorrow's Tourism" - the Government's tourism strategy.

1. Current Trends

In January 2001, the English Tourism Council (ETC) published *Perspectives on English Tourism*, which examined the changing profile of English tourism. It revealed that:

On the positive side:

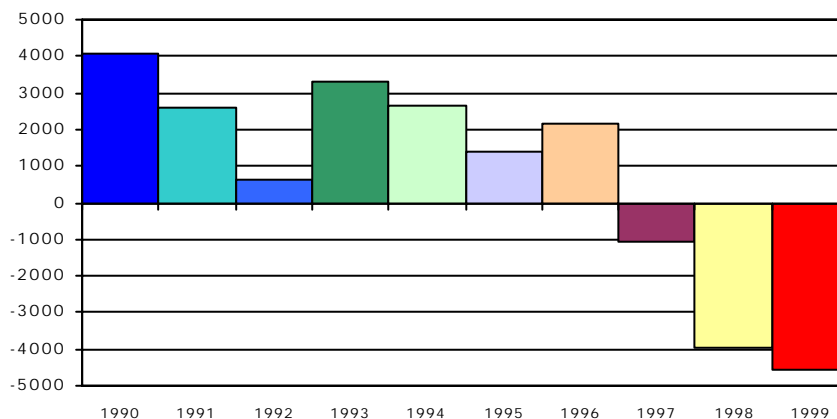
- Tourism by English people in England has increased by 59% over the past 10 years.
- Total tourism spend, by domestic tourists, has grown by 21% from £10.6 billion to £12.9 billion over the same period.

However, and more alarmingly:

- Total spend on overseas tourism by residents of England grew by 95% from £13.2 billion to £25.8 billion
- Net tourism expenditure **fell by £8.7 billion**, from plus £4.1 billion to minus £4.5 billion,

And in the space of just three years from 1996 to 1999:

- Net tourism expenditure moved from a **surplus** of £2.1 billion to a **deficit** of £4.5 billion.



Thus, "Perspectives" shows that English tourism is doing well. However, outbound tourism is growing significantly faster and England now has a major tourism deficit. This represents an opportunity for England to capitalise on the growing demand for tourism provided the barriers to further growth are addressed in the face of strong overseas competition. We believe that the immediate priority areas for tourism are as follows:

2. Immediate Priorities

i. Information Technology

The development of a national system of integrated information and e-commerce would make booking much easier, and help England to compete more effectively for tourism expenditure. Pump-priming investment is required from the public sector to make a national and co-ordinated system a reality.

ii. Quality

Quality is a prerequisite of a successful tourism industry and is particularly important in the accommodation sector. The quality of England's tourism, especially its accommodation is often patchy. The National Quality Assurance Standards help to raise awareness of quality issues with the trade. However if this scheme is to make a real difference there needs to be a greater level of consumer awareness.

iii. Resort Regeneration

England's resorts have been identified as destinations in need of regeneration by the ETC's Resorts Task Force. Its recommendations are set out in a full report that was published on 27th February.

iv. Transport

Tourism is highly dependent on transport infrastructure. Tourism is likely to be given a significant boost by the planned investment in road / rail infrastructure. Also important, however, will be further investment in 'visitor- friendly' information systems and improving transport interchanges.

3. Areas of Common Interest for Government and ETC

Tourism is difficult to define, fragmented and very diverse. Government intervention is needed to set policy and strategy, to assist in the co-ordination of the industry; to support the vast numbers of very small businesses; and to improve quality and to encourage tourism related regional development.

This diversity means there is a strong synergy between the aims of the ETC and those of wider Government. As tourism touches on so many areas of government policy there are many opportunities for joint working. Examples include:

DTI

- Encourage a more competitive industry - with better regulation, greater appreciation of the tourism industry's strengths and weaknesses and the impact other legislation has on this complex sector;
- Work together to develop a more proactive use of e-tourism throughout the sector (especially for SMEs).
- Share knowledge of tourism micro-businesses to help develop a better understanding of the specific needs of the tourism sector, and deliver business advice via SBS / Regional Tourist Board partnerships.

DfEE

- Jointly improve the tourism industry's understanding of the Disability Discrimination Act, especially by small businesses via workshops and other guidance. Encourage tourism businesses to employ more disabled people.
- Ensure that the Learning and Skills Councils have an appreciation of the employment and training needs of the tourism industry and work with the Regional Tourist Boards to fund and deliver practical solutions.
- Work with the relevant NTOs and other bodies to illustrate the importance and suitability of vocational training courses for the tourism industry.

MAFF

- In partnership with the Countryside Agency, maximise the impact of the upcoming rural tourism strategy and ensure its proposals are taken forward constructively.
- Use the Regional Tourist Boards as special advisors for MAFF funded tourism projects
- Jointly support regional diversity, for example, through regional food and drink initiatives.

DETR

- Work together to ensure that tourism is adequately considered when reviewing planning policy guidance.
- Ensure that tourism issues are factored into reviews of the Transport 2010 programme and into the related multi-modal

studies.

- Draw up guidance to help RDAs appreciate the need to support seaside resorts as an important component in their regional strategies.
- Complement DETR's Quality of Life Indicators with a set of indicators to ensure measurable progress towards sustainable tourism.

Home Office

- Work together to ensure that the current review of gaming legislation takes into account the needs of the industry and wider regeneration needs.
- Work together to ensure that the needs of tourism destinations, particularly resorts, are factored into Government policy on the placing of asylum seekers.

All

- Support the quality drive by staying only in ETC/AA/RAC quality assured hotels when travelling in England.

4. 'Tomorrow's Tourism' - Industry Achievements

While the industry has responded to the recommendations contained in 'Tomorrow's Tourism' it is certainly the case that the broad nature of the document and the lack of further specific funding to deliver key areas of the strategy has affected its implementation. ETC consulted the industry to review what types of action have been taken, and a selection of the responses is set out below. They are categorised under a number of headings drawn from the strategy.

Raising Standards and Quality

To compete on a global scale, tourism in England must offer a first class product. Quality is key to the tourism experience.

- Together with the **Automobile Association** and **The Royal Automobile Club**, ETC has launched the harmonised grading schemes for hotels and guest houses in England.
- In June 2000, ETC published the Pink Booklet, a practical guide to legislation for accommodation providers. To date, approximately 14,000 copies have been sold or distributed.
- Jointly with the **National Caravan Council, the British Holiday Parks and Homes Association and the other national boards**, ETC has finalised new Standards for holiday touring and camping parks.
- In conjunction with the **Youth Hostel Association**, ETC has developed a grading scheme for youth hostel accommodation.
- **The Confederation of Passenger Transport** has developed a Coach Marque, a comprehensive quality standard for the UK travel coach industry. There are currently forty coach operators who have the Marque. The CPT is also producing an assessment disc that will enable operators to benchmark their drivers' performance.
- **The Business Tourism Partnership**, jointly with the **Hospitality and Catering International Management Association** has introduced a Hospitality Assured Accreditation Scheme that guarantees standards at conference venues throughout the UK. Thirty five venues have been accredited to date, and another sixty are going through the system.
- **The East of England Tourist Board** has established a Visitor Attraction Quality Assurance Service. One of the key projects under this service has been the Colchester Quality Promotion Programme. The aim is to bring all local attractions within the scheme, first, by concentrating on the local authority owned attractions and then by offering incentives for private owners to join.

- **English Heritage** has piloted the Visitor Attraction Quality Assurance Scheme at two sites, Audley End House and Framlingham Castle.
- **The Historic Houses Association** has revised its Code of Practice for heritage properties and has also negotiated a quality promotion scheme both with their own members and those that are members of the National Trust and English Heritage.
- **Southern Tourist Board** has launched a programme of tourist information centre benchmarking. To date, 140 TICs have signed up - this represents 25% of the overall TIC constituency. STB have also launched the Dorset and Hampshire Attraction Benchmarking Programme. This provides a benchmarking service to small and medium sized attractions and is currently being rolled out on a national basis through the Regional Tourist Boards.
- The **Association of Leading Visitor Attractions** has introduced a Mystery Guest Scheme whereby members visit each other's sites and report back on their findings.
- **Northumbria Tourist Board** is developing a Project Impact Evaluation Model to monitor and assess potential and realised tourism projects.
- **The British Holiday and Home Parks Association Limited** has worked with DCMS to produce a holiday parks self-assessment benchmarking scheme which it actively promotes to park owners.
- **Action for Attractions**, the ETC's strategy to raise standards and quality in the attractions sector, was launched by Tourism Minister Janet Anderson. This followed an industry partnership to identify the key issues affecting the sector and how those issues could be addressed.

Priority Actions required to Raise Standards and Quality

- In order for quality to improve substantially, and for businesses to see the bottom line benefits, the National Quality Assurance Standards need to be better understood by the general public. This will take consumer promotion and complementary work targeted towards the trade.
- Actions for Attractions identified the inconsistency between lottery funding available for public attractions as against private sector businesses that cannot receive such support. More needs to be done to ensure a level playing field.

Developing a Trained and Motivated Workforce

A skilled and committed workforce is central to any successful venture. Finding ways of training and stimulating members of staff is therefore crucial. Sound management and employment practices are key, as these initiatives demonstrate.

- **ETC** has collaborated with the main tourism training organisations to identify skills gaps and training needs in the tourism industry. In addition, in 1999-2000, over 32,000 people attended one of the "Welcome Family" training courses (designed for those working in the hospitality sector).
- **The Confederation of Passenger Transport** has secured the commitment of the larger coach operators to the introduction of a set of revised skills targets. These provide that 60% of drivers should by 2006, achieve or be working towards, an appropriate S/NVQ or recognised equivalent.
- **Norman Richardson House** working with the **British Institute of Innkeeping** and the **Prince's Trust Volunteers** has helped to develop a new work-readiness training programme for New Deal and other categories of trainees. This will lead to guaranteed employment for up to 500 trainees p.a.
- **The British Association of Leisure Parks, Piers and Attractions** has launched a training module, "Best Start" which will provide transferable qualifications for new recruits to the industry. While this module can be used as a stand-alone unit, it is also the fifth module of a new Certificate in Visitor

Attractions Operations. The other four modules are Welcome Host, Welcome All, the basic Food and Hygiene certificate and the basic certificate in Health and Safety.

- **The British Holiday and Home Parks Association** will soon be promoting a new integrated operations/NVQ system for "on park" training.
- The **Heart of England Tourist Board** has developed a Coventry based training project called "Coventry Welcomes You with Pride". This initiative was designed to increase Coventry's competitiveness as a visitor destination by creating a service culture within the City. Over 1,400 participants attended a free one day course, 220 of these going on to attend one of the HETB courses within the "Welcome" family.
- The **Association of British Travel Agents** Ltd. last year published "Britain - We Have the Knowledge". This is a self-study pack that helps travel agents to support domestic tourism . Regional input is supplied by the Regional Tourist Boards.
- The **Tourism Management Institute** has produced a Code of Conduct for industrial placements for students. This allows both employer and employee to set out their aims and objectives and to specify at the outset what they are hoping to learn from the experience.
- The **North West Tourism Skills and Employment Network** was launched in September 2000. The aim behind the scheme was to ensure that the industry's training needs were both understood and met by regional training providers. The North West Development Agency has identified this project as one of their most important regional initiatives.

Priority Actions required to develop a Trained and Motivated Workforce

- The overriding concern is the recruitment, retention and training of staff within the industry - particularly in the hospitality sector. This affects industry competitiveness and quality. Additional support should be given to national and regional bodies dealing with this issue.

Information and Communications Technology

Technology offers huge opportunities for the industry, both as an information tool for prospective customers and by opening up a whole new market for bookings. Small businesses in particular, will require support if they are to reap the benefits that ICT brings.

- **ETC** has launched a new website (www.englishtourism.org.uk) which provides tourism businesses and professionals with access to essential advice and information.
- **Northumbria Tourist Board**, with the support of **OneNorthEast** has developed an intranet for Tourist Information Centres. This now has approximately 60% coverage. On-line training is available through the site.
- **The Association of British Travel Agents**, together with the **Yorkshire Tourist Board** has piloted an internet booking system. Holiday packages were made exclusively available to some thirty travel agents via this system. ABTA has also put online the British Travel Agents' Accommodation Register of commissionable UK hotels. This is accessible by members only.
- **The Youth Hostel Association** is phasing in a new computerised booking system, "Compass" through which guests will be able to book and pay on-line. Compass will also provide the YHA with an Association-wide intranet.

- **The British Holiday and Home Parks Association** has launched a trade website for all members. Entries are linked to separate trade sites and to the British Tourist Authority's website. Since its launch in March 2000, the site has had over 11 million hits.
- **The Countrywide Holidays Association** is developing a website that will contain information on walking, leadership training and sustainable tourism issues. It will also allow members to share good practice information.
- **Norman Richardson House** has helped to pioneer a business support website for small and micro businesses. The site, "Open All Hours" will be launched in the summer.
- The **Automobile Association** has developed a new a "Home Routes Service" which provides route planning advice, tailor-made for the driver e.g. routes suitable for those towing caravans.

Priority Action required to develop Information and Communications Technology

- Funds are required for the development of a national tourism e-commerce, information and booking system. Without this England will lose competitiveness against other national and international destinations.

Improving Accessibility

Access is a fundamental issue for tourism, covering areas such as disability, social inclusion and better provision for the elderly and those with families, The examples below demonstrate the diversity of work that is already being done in this field.

- Working with a range of bodies including **Holiday Care** and the **Tourism for All Consortium, ETC** has revised its National Accessible Standards. For the first time there are now Standards for visual and hearing impairment.
- **ETC** last year published its Access Action Agenda covering a wide range of accessibility issues. Together with the Regional Tourist Boards (led by Heart of England) it ran a series of workshops designed to look at various aspects of access work including the National Accessible Standards and the practical implications of the Disability Discrimination Act.
- Jointly with the **Hoteliers' Forum, ETC** has developed a pilot project that reviews the issues surrounding the recruitment of people with disabilities into the hospitality industry.
- Since the publication of "Tomorrow's Tourism" **Holiday Care** has carried out 23 site visits to advise operators on accessibility and has given 34 presentations to industry groups and trade associations on access provision and the Disability Discrimination Act. On the consumer side, it has answered over 48,000 enquiries from people with disabilities, has made 2,309 accessible accommodation bookings and has developed a database of 310 care homes offering respite for people with disabilities and/or their carers.
- **Birmingham City Council** has worked with local partners to support a wide range of ethnic festivals and events including Birmingham International (predominantly African Caribbean), Diwali, Chinese New Year and Vaisakhi (Sikh festival). These events serve the needs of the local communities as well as attracting many new visitors to the area.
- **The British Holiday and Home Parks Association Ltd** has published a range of advisory articles on disabled access in holiday parks, and has participated in developing the National Accessibility Grading Scheme. It also runs an advisory service for members.
- Under the umbrella of "North West for All" the **North West Tourist Board** has developed a series of initiatives to share best practice. As part of this project, Greater Manchester will hold a conference jointly with the Disability Rights Commission on 7th March to look at how different tourism providers (attractions, restaurants and hotels) perform when visited by an Accessible Mystery Shopper. As part of the same NWTB initiative, Cheshire is developing a website that provides accessibility information to both

visitors and operators.

- The **Heart of England Tourist Board** has worked on a project that seeks to widen disabled access within the National Forest. This includes an access pack containing information on accessible sites within the National Forest, and Access Standards Guidelines. Grant aid has been made available to art projects involving the disabled e.g. a sculpture trail at Thornton Reservoir and at the National Forest visitor centre.
- **The Countrywide Holidays Association**, through its associated charity, the Invited Guest Trust is working with a number of groups, such as Young Carers to provide them with holidays in the countryside. CHA are also working on the "Walking for Health" campaign that is being developed by the British Heart Foundation and the Countryside Agency. This campaign is promoted as being particularly relevant to the elderly or more mature participant.
- **The Historic Houses Association** has appointed a Disability Access Advisor. The Association has also worked with English Heritage on a scheme that develops the educational potential of privately owned historic houses. This scheme is supported by DCMS and DfEE.
- **The East of England Tourist Board** has acted as project advisor to the Norfolk Coast Millennium Access Project. The aim of this initiative is to make the coast more accessible to the elderly and to people with disabilities. Five specific sites have been chosen and during the summer, they will offer a wide range of easily accessible events including drawing workshops, guided walks and pond-dipping for children.

Priority Action to Improving Accessibility

- A greater degree of industry awareness about the Disability Discrimination Act and related financial support to enable businesses to meet the requirements of the Act.

Encouraging the Wise Growth of Tourism

Sustainability is widely recognised as being central to the survival of the industry. Together with access, it underpins every aspect of the tourism product.

- **ETC and the Countryside Agency** have jointly revised the Green Audit Kit to encourage more sustainable management of small tourism businesses. Nearly 3,000 copies of the Guide have been requested and distributed over the three months since the Guide was launched. **ETC** will soon be launching its Sustainable Tourism Strategy which will contain a set of national wise growth indicators. ETC has also launched a new sustainable tourism website (www.wisegrowth.org.uk)
- **Bath and North East Somerset Council** part funds the charity, Envolve. This promotes environmentally sustainable practices amongst local businesses. Envolve assists over sixty tourism businesses per year. As a result, thirty businesses in the past two years have achieved the South West Tourist Board's merit award for green tourism.
- **The Lancashire Tourism Partnership** is undertaking a seven year programme to develop Lancashire as a major tourism destination. Projects included as part of this scheme include Green Lantern, a resource network that has enabled 172 tourism businesses to benefit from environmental reviews.
- **The British Holiday and Home Parks Association Ltd** has developed the David Bellamy Conservation Award, an annual sustainability audit scheme. In 2000, the scheme saw a 49% increase in take-up by park owners with a 44% increase in those parks receiving the top award. BH & HPA have also published a children's conservation passport which encourages children to spot flora and fauna. BH & HPA are currently developing a local products directory which it will circulate to its members.
- **The South West Tourist Board** has worked with South Hampshire District Council to produce the Green Tourism Initiative. The programme covers a number of specific components including the Green Grading Awards, the Green Audit Kit and the development of a visitor payback scheme. The Awards are a

form of accreditation, offering standards against which participating businesses can measure their performance. The first awards are due to be made later this year.

- SWT is also working with **Going for Green** to develop a South West Green Card designed to raise public awareness of sustainable issues. It will operate as a discount card, giving visitors a discount when they visit environmentally focused attractions or use environmentally friendly transport. It will also feature a code of good practice for the public.
- In June 2000, **Sustrans** launched the National Cycle Network, 5,000 miles of continuous, traffic-free routes and traffic-calmed and minor roads. A further 5,000 miles will be opened by 2005.
- **ICOMOS UK** is conducting research into visits to cathedrals and other places of worship with a view to determining a variety of issues. These include measuring the impact of visitors and identifying techniques that will better manage that impact.
- The **Wayland Partnership Development Trust** has initiated The Taste of Wayland Food Forum. This is designed as a tool to promote local produce. Membership has grown to around 35 and comprises a mix of producers, retailers and representatives of the hospitality sector. A monthly farmers' market to attract visitors to the town has also been introduced.

Priority Actions to Encourage the Wise Growth of Tourism

- Encouraging greater industry action via regional partnerships and practical guidance to all stakeholders.

Improving Transport

Tourism is highly dependent on an efficient and integrated transport system. Transport is therefore a critical component of a successful industry. Many visitors would prefer to use public transport but are discouraged from doing so by what they perceive as a lack of reliability or integration. A fully integrated transport infrastructure would encourage more people to use public transport and would allow visitors to move more freely between popular sites.

- **The Confederation of Passenger Transport** last year launched Traveline, a national public transport information system that provides timetables for bus, coach, tram, underground, train, ferry and metro. The CPT has also drafted a Code of Practice for coach operators and local authorities.
- **Transport 2000** has undertaken a project entitled 'Tourism without Traffic'. Commissioned by the DETR, it was a two-year project to develop strategic approaches to promoting alternatives to the car for leisure travel. There were three strands:
 - a pilot scheme in East Sussex to develop a model for promoting alternatives to the car in a tourist area. The aim is to reduce leisure travel by car in the South Downs by working in partnership with local agencies;
 - development of green travel plan for a specific leisure facility which can be used as a model for others - Harewood House near Leeds was chosen;
 - the production of a good practice guide, supported by ETC.
- **Park and ride schemes** have been established in many historic towns. In Oxford, the edge of town Park and Ride scheme has worked well through the co-operation of the city and county councils and two local bus companies. The local authorities have regulated car movements, parking spaces and charges, and bus priority schemes, while the bus companies have provided frequent, comfortable, reliable services at low fares (including family fares).
- By 2003, **Transport Direct** is expected to include: real-time information on train operation and many local bus services; multi-modal information covering road journeys as well as all public transport modes; booking of long-distance multi-modal journeys; maps to allow travellers to examine public transport options both for visiting a specific venue and for general travel around an area they are considering going to.

- **BTA, DCMS and DETR** have initiated a pilot project (Travel Cumbria) to bring together tourist and public transport information, and to make this available to tourists over the Internet. It covers the county of Cumbria, and gives users access to easy-to-use maps that plot hotels, tourist attractions, railway and coach stations, bus stops and other items. Information available offers descriptions, opening times, prices and timetables.
- **London City Airport** has adopted the concept of "the airport as a hotel" in its approach to customer service. The approach includes the employment of a "conciierge" at the exit of the airport to assist passengers with their onward journey and welcome and provide information to arriving passengers.
- **The Moors Bus** network has been evolved over a decade under the leadership of the North Yorks National Park. Innovative ticketing schemes, coupled with regular service provision, matched to potential visitor activities and destinations, have resulted in the network bringing more visitors to the Park. At the same time, some previously car borne visitors can be converted to use public transport.
- **Partnerships between Cumbria, Durham and Northumberland** have sought to reduce the pressures from cars in the North Pennines and in particular visitor attractions such as Hadrian's Wall and Alston, England's highest market town. Public transport links have been established promoting local bus and rail services to give a choice of transport to visitors. Leaflets include information on the visitor attractions and signposted footpaths including the Pennine Way.
- In the **South West**, there have been a number of projects based on branch lines intended to encourage greater use of the railway and exploring the countryside on foot and by cycle. These have included the Tarka Trail, the Tamar Valley and Looe branch lines where facilities such as local trails, cycle hire, and interpretative facilities have been provided along the route, and the development of the Camel Trail off road cycle track using redundant rail routes.

Priority Actions to Improve Transport

- Further investment in 'visitor- friendly' information systems and improving transport interchanges.

Stimulating Innovation

While the domestic market has seen a downturn in the traditional two week break, it has witnessed a considerable upsurge in the short break category. People are increasingly looking for holidays that allow them to combine a hobby with leisure time and there is therefore a growing market for niche breaks.

- **Sustrans** have produced the second edition of "The Market for Cycle Tourism". This report demonstrates how the development of twelve pan-European cycle routes will benefit tourism, and forecasts the European cycle tourism market as being over E21.5 by 2020.
- In November 2000, a new exhibition centre for London was opened providing 65,000 sq. metres of space. The centre, **Excel**, cost in the region of £200 million and was entirely funded by the private sector.
- **Derby Tourism and Derby County Football Club** have put together a marketing campaign to develop the profile of Derby to visitors. The basis of the programme was a package of behind the scenes tours of the club fronted by the Belgian player, Branco Struper. Despite a limited budget, the results were very impressive with Derby able to welcome its 1,000th Belgian visitor this year.
- In 1979, **Hampshire County Council** purchased Fort Nelson, a derelict fort dating back to 1860. The Council has since been renovating the fort and in 1995, it opened as a museum. The fort now receives 45,000 visits p.a. of which 10% are educational. A specialist conservation business operates from the fort with an annual turnover in excess of £100,000 p.a.
- **Windsor and Maidenhead** have created their own short course "Windsor Welcomes" which educates local businesses on tourism products to be found in the town. To date, 637 people have completed the course. Participants include hotel receptionists, shop assistants, Blue Badge Guides and local councillors.

- The **Business Tourism Partnership** has undertaken research to capture data on business travel. The output will be a more comprehensive picture of overall value and volume of conference business in the UK.
- The **Business Tourism Partnership** has worked with **British Trade International** to design an initiative that supports SMEs wishing to exhibit or trade at international fairs. The scheme was piloted in January and won exports for fifty SMEs that were first time exhibitors. Four inward missions were arranged as a result of this work and specialist export and administrative counselling was provided for some 1,500 business meetings.
- **Fylde Select**, a project involving a range of partners including the North West Tourist Board and local government, has developed a niche product, "Bird Watching on the Fylde Coast". This involves accommodation providers working closely with the RSPB to offer and promote a two day guided bird watching break. It has proved to be a very popular innovation.

Priority Actions to Stimulate Innovation

- A strategic marketing remit is required for England to ensure co-ordinated product development, national promotion and a more competitive market position.