



department for
culture, media
and sport

improving
the quality
of life for all

Winning: A tourism strategy for



Our aim is to improve the quality of life for all through cultural and sporting activities, support the pursuit of excellence, and champion the tourism, creative and leisure industries.

Information about DCMS, VisitBritain and Visit London can be found on the following websites:

DCMS www.culture.gov.uk

VisitBritain www.visitbritain.com

Visit London www.visitlondon.com

LDA Visit and action plan for London

www.lda.gov.uk/server/show/ConWebDoc.1513

Winning: A tourism strategy for 2012 and beyond

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Foreword



Rt Hon James Purnell MP

Secretary of State for
Culture, Media and Sport

Winning the 2012 Olympic Games and Paralympic Games was a great victory for London and the UK. It showed what we have to offer the world. And our success showed that other countries liked what they saw.

But that victory was also a great opportunity. Not just for our athletes and young people to show their sporting capabilities, or for the regeneration of East London, but for the country as a whole to welcome millions of new visitors to our shores.

That is the opportunity at the heart of this Strategy. Other countries – like Australia and Spain – have shown how tourism can benefit from hosting the Games.

Though we already have one of the best developed tourist markets in the world, with the top national brand in international surveys, we now have the chance to go one step further: to meet rising expectations, to capture new markets and to address changing visitor needs.

This is an opportunity that the tourism industry across the whole of the United Kingdom – one that employs a remarkable 1.4 million people directly and injects £85 billion a year into our economy – must grasp with both hands.

There will be sporting activities in many parts of Britain, and a Cultural Olympiad to showcase arts, music and dance. The regions and nations of the UK are organising exciting plans to enthuse and engage visitors.

But as we do so, we must also grasp the opportunity to improve our tourist infrastructure. We have a growing number of great hotels and ever-improving guest houses. But there are still many that need to improve if they are to reach the standard of the best.

We can do more to welcome visitors, working with our partners to make applying for tourist visas more accessible, to speed their journey through our airports and to provide them with the information they need when they need it. We need to improve the skills of those who work in tourism, not least those who are meeting visitors face-to-face, and retain more people through better career development.

We can do more to attract more business for conferences and events – a vital and competitive world market – by improving our links with organisers and highlighting the growing number of first-class convention centres in Britain.

Many people come to Britain for its countryside and environment, so it is an economic as well as a moral duty to combat the effects of climate change and create a tourism industry that is sustainable.

Doing all these things will not only make Britain more attractive to visitors, it will also encourage them to come back for more.

But this is not just about international visitors. In fact, 80 per cent of tourism income is generated at home by day trips, business stays, holidays at home and visits to relatives. Improving the quality of accommodation, customer service and facilities will be as important in encouraging more British consumers to take more holidays in Britain.

I believe that the Strategy will help us maximise the potential benefits offered to UK tourism by the London 2012 Olympic Games and Paralympic Games and leave a significant legacy for the years beyond that.

We will monitor, evaluate and report on our success. We will be sure to learn the lessons of Beijing 2008, Delhi 2010 and Vancouver 2010 and incorporate those experiences into this Strategy where relevant.

Finally, I should like to thank all those who responded to our *Welcome>Legacy* consultation and all the members of the Ministerial Advisory Group who have been enthusiastic and candid in the level of support they have given to us in producing this document.

Let's all work together to make this a winning strategy for UK tourism.

A handwritten signature in black ink, appearing to be 'J. W.', located below the text.

“The Strategy will help us maximise the potential benefits offered to UK tourism by the London 2012 Olympic Games and Paralympic Games and leave a significant legacy for the years beyond that.”

Executive summary and introduction

The UK's flourishing tourism industry generates over £85 billion a year for the British economy. It is one of our biggest employers, directly responsible for 1.4 million jobs, or one in every 20 people in work.

The 2012 London Olympics and Paralympic Games will be more than a major sporting occasion. They provide us with a unique opportunity to showcase all that Britain has to offer – both to visitors new to our country and to the large number of us who take at least some of our holidays at home. And it is a unique opportunity to ensure that our accommodation and tourist facilities match the best in the world.

That's what this Strategy is about. Not just winning for Britain in the 2012 Games, but ensuring that those involved in tourism, leisure and hospitality are winners too.

What is the tourism industry?

Our tourism, hospitality and leisure industries represent all types of business: from the local restaurant owner to the multinational hotel corporation; from the seaside fairground operator to the giant theme park; from the village museum to the stately home. Their scope encompasses guest houses and public houses, caravan parks and holiday lets, tour operators and conference organisers.

How the Olympics can help tourism

We believe that with the right improvements the London 2012 Olympic Games and Paralympic Games could generate an estimated £2.1 billion in additional tourism benefits (2006 prices) for the UK over the period 2007-17.¹

While the 2012 Games will largely be located in London, they provide an opportunity for the whole country. We can see how other countries – including China, in preparation for the Beijing 2008 Games – are greatly improving facilities for tourists. We must use the 2012 Games as an opportunity to upgrade facilities and give tourists a first-class experience.

Aims of this Strategy

This Strategy aims to maximise the financial benefits of the 2012 Games for the tourism industry. Our vision is to use the Games to:

- **Engage all UK tourism businesses** in a national campaign, starting at the Beijing handover. This campaign – which will be aimed equally at the domestic and inbound markets – will use bold and distinctive branding to provide an attractive and diverse image of Britain which will set the context for the welcome to domestic and overseas consumers.
- **Improve international perceptions of Britain** by developing and promoting a clear and concise country brand that enhances a sense of welcome and positions Britain as a premier tourism destination, as well as being a leader in investment, export, culture and education.
- **Deliver a first-class welcome to all visitors** – inbound and domestic. As well as improvements at our airports and other points of entry, we seek a vastly improved service to disabled people and the provision of fully accessible facilities and information.
- **Improve the skills of the workforce**, through better management and leadership, through customer service training, through recruiting more qualified chefs and through better career development for existing and future employees. This in turn will improve retention within the industry.
- **Drive up quality in accommodation** by a step-change in the number of hotels that are accredited for their quality, and by improving feedback from tourists
- **Maximise the opportunities for increasing business visits and events**, with the aim of making the UK the leading country in the world for holding business events and conferences.
- **Spread the benefits** to ensure that **every** part of the UK benefits from the Games and the Cultural Olympiad which will precede them.
- **Improve sustainability** by ensuring that the needs of the community are central to the development of tourism and that the environmental impact of tourism is resolved in line with the ambition to make the Games the greenest in history.

The UK's flourishing tourism industry generates over £85 billion a year for the British economy. It is one of our biggest employers, directly responsible for 1.4 million jobs.



By doing this we can see a significant growth in international visitors and domestic tourism. We can increase the economic benefits of tourism to the national economy faster than would otherwise be possible.

Through this Strategy we want to ensure that the whole tourism industry recognises and realises the potential benefits from the Games. We want to welcome the world to Britain, and reassure those with concerns, that London is open to visitors as the Games approach and is big enough for all potential visitors as the Games take place. And we want those who visit London for the Games to see more of Britain – and to visit again.

Tourism and the economy

The £85 billion spent annually on UK tourism has three major components: £17 billion spent by 33 million overseas visitors (including travel to the UK); £44.3 billion spent on day trips by UK residents; and the £22.7 billion they spend on trips involving staying away from home.

The Olympic potential

Tourism is a growing industry, and has the potential to grow further. Other cities have shown the difference the Games can make. Barcelona's 1992 Games helped propel the city from the 16th to the third most popular short break destination in Europe. Sydney's 2000 Games generated an extra 15 per cent in visitor numbers during the event month and 11 per cent more during the year.

We believe that we could see a £2.1 billion boost in tourism revenues as a result of the 2012 Games. But we also believe they offer us a chance to boost the number of UK residents taking longer holidays at home.

Boosting our domestic appeal

We spend 126 million nights away from home in the UK every year, nearly two thirds of them on holiday (others are mainly for business or visiting relatives). And we take 872 million day trips for leisure, including 62 million to the seaside and 136 million into the countryside.

But while more people than ever are taking day trips – including shopping trips – fewer are staying overnight at UK destinations. With heightened interest in Games-related activities, we can set about reversing this decline.

We will do this in three ways. First, we will spell out the potential benefits of the Games to all UK tourism businesses, including the domestic opportunities. Second, we will allay potential fears of London being "a building site" ahead of the 2012 Games and "too full" during the Games. And third, we will help improve staff skills and the quality of accommodation, restaurants and attractions.

Boosting our international appeal

Tourist numbers and revenues continued to grow in 2006, with visitors spending (excluding fares) £15.4 billion. However visitor numbers have not yet returned to their 1990s peak.

VisitBritain and Visit London will actively market Britain in Europe, long-haul markets like the US, Japan and Australia, and emerging markets including China, India and Brazil. Our strategy must be to make London and Britain "must-see destinations", using the campaign as an opportunity to reach younger visitors and to encourage visits to friends and relatives.

The campaign will be linked to the 2012 Games and Cultural Olympiad, supported by increased corporate sponsorship. We will ensure that the industry has accurate up-to-date information and that fears of disruption are allayed. And we will maximise the legacy through effective post-Games marketing.

A timetable for tourism

Over the next year, we will prepare the ground for the handover of the Olympic baton after the Beijing 2008 Games.

2008: We will take the baton from Beijing and launch the Cultural Olympiad in collaboration with Liverpool, European City of Culture. We will also launch a four-year marketing campaign to welcome the world to Britain.

2009: We will build momentum by showcasing London and Britain to international event planners and integrate the Games into an all Britain brand and public diplomacy activities.

2010: We will galvanise Britain, encouraging business to “roll out the red carpet” to visitors. We will create a new travel writers’ centre. And we will develop relationships with Canada and India, linked to the Winter and Commonwealth Games.

2011: We will invite the world to visit, highlighting our many attractions and allaying any fears. We will identify and refine post-Games marketing opportunities.

2012: We will provide a great welcome and comprehensive information to all Games visitors, supporting UK businesses in ensuring they enjoy their time in Britain. We will provide excellent hospitality for targeted world travel leaders and full support to the media.

Beyond 2012: We will cement the London 2012 Games legacy with marketing activities and encouragement to the industry to build on gains made up to 2012.



Black cab, London

Branding Britain and London

Later this year, VisitBritain will launch its marketing strategy for the Games, with a revised Britain brand designed to reflect the energy and global appeal of the Games. They will be informed by an expert marketing group. Visit London is also working towards a new brand for London, linked to the Games. Both agencies are ensuring close alignment of their work.

Beijing and the handover

Both VisitBritain and Visit London will be present in Beijing next year for the Olympics, showcasing British culture and highlighting London's cultural diversity.

An extensive programme of activities is being organised by the London Organising Committee of the Olympic and Paralympic Games (LOCOG) to mark the handover from Beijing to London, including a spectacular presentation of the city as part of the 2008 closing ceremony.

Spreading the benefits

If the 2012 Games are to leave a significant tourism legacy, their benefits should be shared across the UK. The biggest such benefit should be through increased tourism. DCMS is working with local and regional Government, and national administrations in Scotland, Wales and Northern Ireland to ensure that all maximise the tourism potential of the Games.

Each region and nation has its own priorities. For example the North West plans to capitalise on Liverpool 2008. Northern Ireland is promoting Belfast's Titanic Quarter. Others will build on their Olympic Games and Paralympic Games heritage: Much Wenlock in Shropshire inspired the modern Games and Stoke Mandeville in Buckinghamshire was the birthplace of the Paralympic Games. Glasgow has a very strong bid for the 2014 Commonwealth Games.

The Cultural Olympiad

A major cultural programme is being developed alongside the sporting elements of the 2012 Games. Australia saw a 30 per cent increase in visitor participation in cultural activities after a similar exercise linked to the Sydney Games. The Cultural Olympiad will involve theatres and museums; libraries and stately homes; cinema and digital technology. There will be live music, dance and comedy.

The Cultural Olympiad will have three main elements. There will be a strong cultural focus to the main Olympic ceremonies. There will be major international festivals: a World Cultural Festival, the International Shakespeare Festival and an International Museums Exhibition. And there will be a UK-wide cultural festival of community cultural projects.

Business visits and events

The London 2012 Games are an excellent opportunity to reinforce Britain's reputation as a world-class destination for business visits, conferences and events. In an increasingly competitive market, we need to ensure that our facilities match the best in the world and that we do all we can to encourage conference organisers to choose London and the UK.

The value of business tourism

Business tourism – with 8 million visits during 2005 – already accounts for over a quarter of all overseas visitors and 31 per cent of inbound tourism earnings. It also has a wider economic impact – through associated travel, entertainment, shopping and tours – worth £22 billion a year.²

The typical business visitor spends nearly £120 a day, almost twice as much as the average holidaymaker. Such year-round activity supports 530,000 jobs, many of them full time, and has made the UK the third most popular destination for international meetings after the US and Germany.

Through this Strategy we want to ensure that the whole tourism industry recognises and realises the potential benefits from the Games.



The business sector also helps to sustain the wider tourist infrastructure, filling seaside hotel rooms for conferences out of season. It supports urban regeneration through the provision of new conference facilities in cities like Manchester, Glasgow and Cardiff. Business tourism is resilient during economic downturns, and business tourists who enjoy their visit can be excellent ambassadors for a destination to colleagues and friends.

Meeting business and conference needs

VisitBritain is working to maximise business tourism by encouraging conference organisers to come to Britain. Some business travel is not discretionary. But its research has shown that 16 per cent of conference delegates can be influenced to come here. They account for 6 per cent of total visitor spend or nearly £900 million.³

eventBritain is a new dedicated events unit to support sporting, cultural and business events organisations. The unit will provide access to specialist support, linking the Britain brand to business tourism much more than before. It is essential for Britain to maximise the opportunity of hosting the 2012 Games. Our analysis of previous Games in Barcelona, Atlanta and Sydney, shows that business visits and events could accrue up to 50 per cent of the overall tourism economic benefits of hosting the 2012 Games. eventBritain is a key unit in ensuring that this potential is fulfilled.

This is also a highly competitive sector. So we must constantly ensure that our facilities are updated to meet the needs of business. We will research their needs and those of conference organisers to inform our strategy, and we will consider a wider assessment of the economic and employment impact of business tourism in the UK's regions and nations. There are real opportunities for growth in this sector. Although Britain is ranked third in the world for international associations events (up from fourth in 2005 and fifth in 2004: International Congress and Convention Association), it received only 4.8 per cent of the global total of US\$9 billion in 2006.

Co-ordination in the capital

Events for London has been established as a one stop shop for anyone staging an event in the capital. It can help organisers sort out accommodation, transport, security and other needs. The organisation will also develop new events that complement the city's cultural diversity, expand existing events and attract major international festivals and forums.

DCMS also supports proposals for a major new International Convention Centre (ICC) in London. A feasibility study for the Mayor advised that the new ICC could generate an extra £400 million for the capital with at least 5,500 extra jobs.

Welcoming the world

We need to do all we can to ensure that overseas visitors receive a welcome second to none when they come to Britain. This is a challenge for everyone: from those providing transport links to accommodation. Our success in this will determine the 2012 Games legacy for tourism.

Britain has a strong brand – top place on the major national brand index – but scores only 16th out of 38 for the welcome we offer. We must do better. This means cutting delays and improving arrival facilities at airports and ports, on planes, trains and ferries.

An improved visitors' experience

A new Welcome Charter will commit the tourism and hospitality sector to providing good service. Ports of entry are being improved – with Heathrow Terminal Five opening next year and the new Eurostar terminal this year – and a more proficient image by immigration staff. Improved procedures will make tourist visa processing easier. The Welcome to Britain Group – a focus group for the sector – is ensuring that security requirements are balanced with providing a warm welcome to visitors.

We must improve customer skills, across a range of sectors which impact on the visitor, with the training likely to include English language, foreign languages and cultural awareness and disability awareness. The relevant Sector Skills Councils are analysing existing programmes and their effectiveness, and will report in 2008 with clear recommendations for improved training in this area.

Improving quality

It is vital that we use the challenge of the 2012 Games to improve the quality of our tourist facilities. Despite much first-class accommodation, there is still too much that is poor, not least in London.

We believe voluntary accreditation is the best way forward. But we need a dramatic increase in the proportion of quality accredited accommodation. Only 53 per cent of all facilities are accredited in the UK. We want to see that proportion increasing to 85 per cent by 2012 and 90 per cent by 2016.

Accessibility for disabled and older visitors

It is estimated that 4,500 disabled athletes and a large number of disabled visitors will come to the Paralympic Games. Many will want to attend other events and attractions. It is important that they find them accessible. The Olympic Village and stadia will be fully accessible, as will London buses, black cabs and the Docklands Light Railway from 2008.

However, only a small proportion of UK hotel rooms or guesthouses is fully wheelchair accessible. We will improve the industry's awareness of the needs of travellers with disabilities, and develop a Code of Practice with the industry to improve room accessibility.



Brighton

Better customer feedback

Hotel and guest house customers are increasingly vocal, often providing feedback on internet sites (such as TripAdvisor) that are read by tourists before booking. They will expect to find such feedback on official websites too. And making that possible is another lever to raise quality. VisitBritain will therefore upgrade its EnglandNet portal to provide reliable, mediated feedback on accredited accommodation.

Improving London accommodation

As Britain's shop window in 2012, it is particularly important that London accommodation is of good quality. Yet only 34 per cent of accommodation providers in the capital are accredited (covering 47 per cent of rooms). This is why the London Development Agency has launched a £1.6 million incentive package to increase the proportion of quality accredited accommodation to 50 per cent by 2010.

Improving skills and retention

The tourism workforce needs better skills to provide the first-class service visitors expect and demand. But we face real shortages: half of managers lack a minimum management qualification; we have too few qualified chefs; most employers believe some of their staff lack customer service skills. This is all compounded by the high level of staff turnover in the industry.

A new and unique online resource, the UK Skills Passport for hospitality, leisure, travel and tourism has been developed to provide information and tools on skills development, training, jobs, qualifications and access to funding. This should make it easier for employers to recruit and keep good staff and help employees take control of their own learning. Qualifications are also being reformed to improve training for managers, chefs and those working in customer service.

Sustainable tourism

We are determined to ensure that as we develop the quality of our tourism, we do so in ways that are sustainable. Within a new national framework, we will develop a sustainable industry with year-round potential: one that has less wasted capacity, supports stronger communities and provides an attractive career option for more young people. We must reduce energy and water consumption, encourage recycling and the reuse of materials.

We will provide businesses with practical help to overcome these challenges, while accrediting those who take positive action on the environment, in order to help visitors make an informed choice. We will also ensure that sustainability is properly recognised in the National Quality Assurance Scheme (NQAS) and Visitor Accreditation Quality Assurance Scheme (VAQAS). We will help more firms to start to go green and support successful awards schemes that recognise best practice. We will market sustainable UK tourism.

We will work closely with the Department for Transport to develop ways to reduce the impact of visitor travel on the environment. The Mayor of London has developed a package of measures to make the capital "the sustainable world city" and the aim is to minimise the environmental footprint and carbon emissions of the 2012 Games and legacy development. Work is underway in many councils and Regional Development Agencies (RDAs) to improve the sustainability of the tourism industry. We are also working through the EU and United Nations to develop international programmes to improve the sustainability of the tourism industry.

Monitoring progress and tracking implementation

We will work towards a new tourism growth target for 2008-11, and later a further target for 2012-15, and monitor progress towards those targets. The first target will be set by April 2008.

Reliable data

For the targets to be meaningful, our data must be reliable. Despite recent improvements, we can improve the quality of data on leisure day visits within the UK and improve our data on spending by international passengers. We can do more to analyse where growth is occurring – comparing the domestic and international markets – and better assess customer satisfaction. All our data must be readily accessible and easily understood.

We must also develop indicators that show the extent to which we are successful in improving the quality of what visitors experience – including staff training, proportion of quality assured hotels and the accessibility of accommodation. We will also work towards a new partnership to improve the quality of information available regionally and locally.

Tracking implementation

Progress towards the timetable and targets set out in this Strategy will be monitored from autumn 2007 to 2012 by a national group of senior representatives of the tourism industry, reporting directly to the Minister for Tourism. There will be monitoring of progress in specific sectors such as the hotel industry and visitor attractions sector. We will also want to ensure that the £300 million of public support for the industry is well spent.

This is the beginning of the journey and we are calling on every tourism business and organisation – nationally, regionally and locally – to engage in the drive to take advantage of this once in a lifetime opportunity and to tackle the key challenges facing the tourism industry. Only by working together in partnership can we make the Games a success for the tourism industry and the UK at large.

If your business depends on domestic or inbound tourism, you need to get involved and learn about the opportunities on offer from the London 2012 Olympic Games and Paralympic Games.

1. The benefits the Games will bring to tourism

"Five years from today the Olympic flame will be lit in London, marking the start of the greatest celebration of sport we will ever have seen in this country. But the vision for London 2012 is about more than just hosting a fantastic summer of sport. It is about using this opportunity as a catalyst for lasting change in our country."

The Prime Minister, marking the beginning of the work on the Olympic Park in East London on 27 July 2007.

Key points in this chapter

- £85 billion is spent annually on UK tourism including £17 billion by 33 million overseas visitors and £44 billion on day trips by UK residents. The industry sustains about 1.4 million jobs directly and more indirectly.
- Tourism is growing, and with the help of the London 2012 Olympic Games and Paralympic Games, can grow further if we learn from the experience of other host cities.
- With the right improvements the Games could generate an estimated £2.1 billion in additional tourism benefits (2006 prices) for the UK over the period 2007-17.⁴
- But we also believe the Games offer us a chance to boost the number of UK residents taking longer holidays at home. Day trips are increasing, but overnight stays are declining. With heightened interest in Olympic-related activities, we can reverse the decline in overnight and longer stays.
- Our strategy will be to make London and Britain "must-see destinations", and we will maximise the legacy through effective post-Games marketing.

Contribution of tourism to the economy

The **£85 billion** that tourism generates represents a return to the levels before the impact of foot and mouth and the 9/11 terrorist attacks. Almost 80 per cent of this expenditure comes from the domestic tourism market – with leisure day trips contributing over half of domestic turnover. Much of the remainder is generated by 33 million international visitors.

Components of UK tourism expenditure (£ billion)

	2000	2001	2002	2003	2004 ⁵	2005
Spending by overseas residents						
Visits to the UK	12.8	11.3	11.7	11.9		14.2
Fares to UK	3.3	3.1	3.1	3.2		2.8
Spending by domestic residents						
Trips on 1+ nights	26.1	26.1	26.7	26.5		22.7
Tourism day trips for leisure	31.8	31.5	31.3	31.8		44.3
Rent for second home ownership	0.9	0.9	0.9	0.9		0.9
Total spend						
Outturn prices	74.9	72.9	73.7	74.2		85.0
2005 prices	84.4	80.8	80.4	78.6		85.0

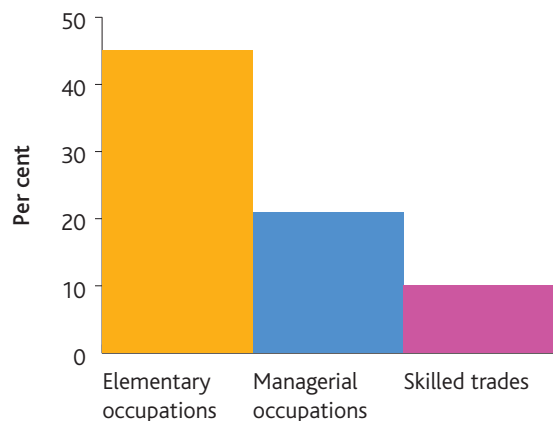
The nature of employment in tourism

Across the UK, the tourism industry sustains about 1.4 million jobs directly and more indirectly⁶ – 5 per cent of all employment in the UK. There is great variety of job type and employment levels across the UK. The restaurant industry is the largest in terms of employment, followed by pubs, bars, nightclubs and hotels. It is predicted that by 2014 there will be a decrease of 19,000 in the number of those working in "elementary occupations" and an increase of 41,000 in the number of managers. In London, tourism directly supports 280,000 jobs.

£85 billion is spent annually on UK tourism including £17 billion by 33 million overseas visitors and £44 billion on day trips by UK residents.



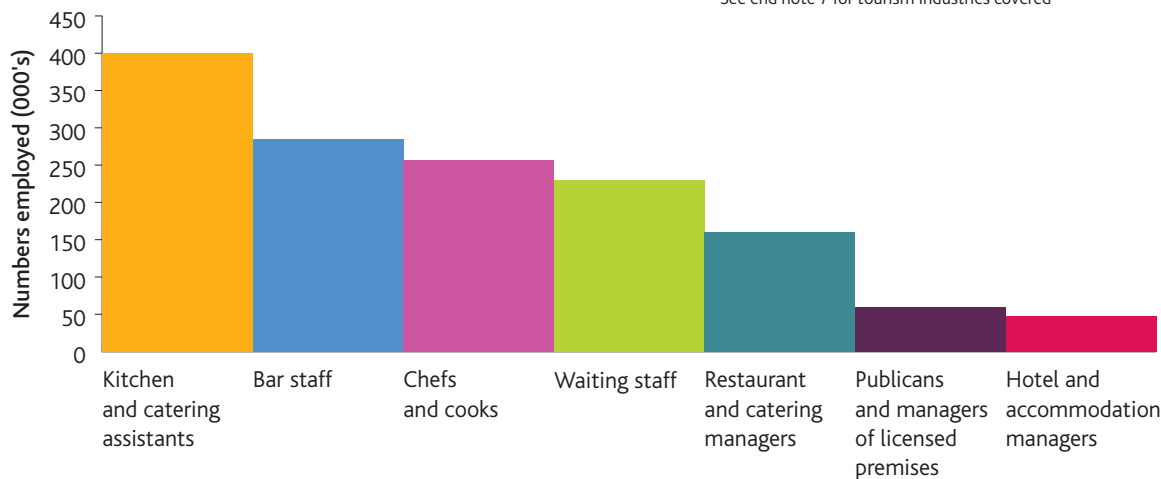
Tourism occupational structure



Coverage: UK
 Source: Labour Force Survey, 2004/05
 See end note 7 for tourism industries covered

The core occupations (in terms of numbers employed) are kitchen and catering assistants, bar staff, chefs and cooks, waiting staff and managers.

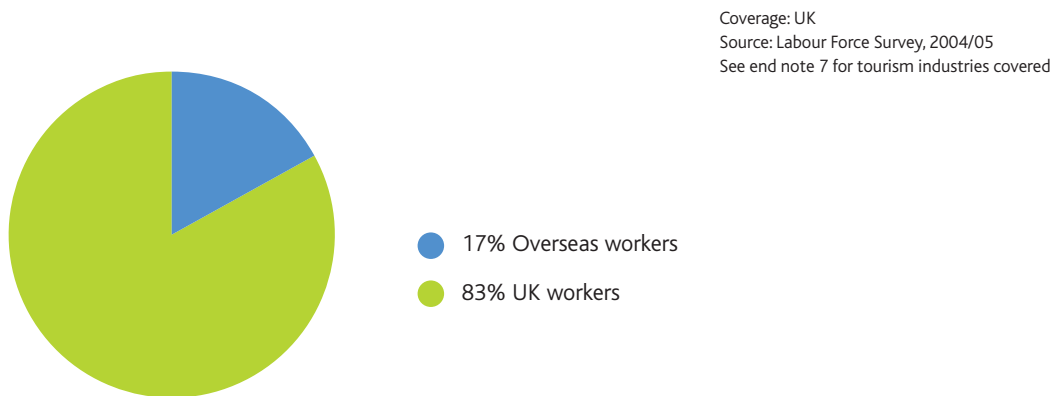
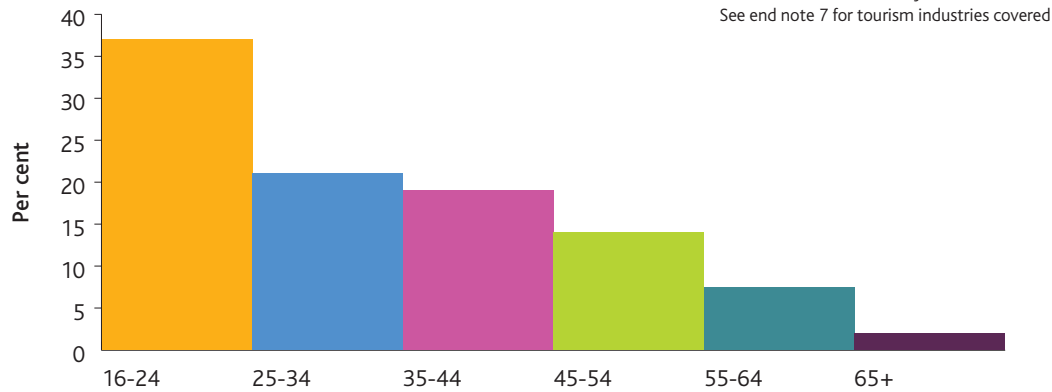
Core occupations



Coverage: UK
 Source: Labour Force Survey, 2004/05
 See end note 7 for tourism industries covered

The industry currently employs a young workforce – just over a third of staff are under the age of 25, with pubs, bars and nightclubs employing the highest proportion of 16 to 25 year olds, many of whom are students. Seventeen per cent of the workforce is from overseas. Sixty-two per cent of people in the sector are female and 38 per cent male.

Age profile



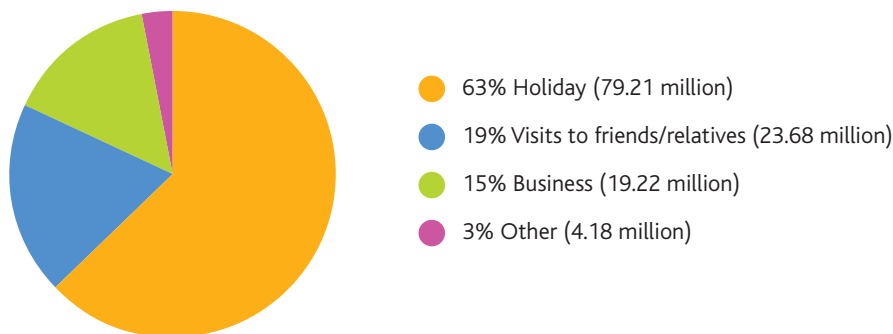
Overseas workers

The sector is almost evenly split between full and part-time workers, with a slight majority of full-timers. However, there are large industry variations. The pub, bars and nightclub industry has the largest percentage of part-time workers, at 60 per cent, whereas in visitor attractions, over 80 per cent are full-time workers, though many may be seasonal.

The industry has witnessed a 7 per cent growth rate in employment since 2000 – more than the economy overall. This growth is set to continue. However retaining staff is a much bigger challenge for the industry. People1st estimate that 70 per cent of all recruitment is to replace existing staff and that the industry loses 600,000 people each year due to high staff turnover rates. Addressing this would ease the recruitment pressures facing employers and cut costs (see Chapter 6).

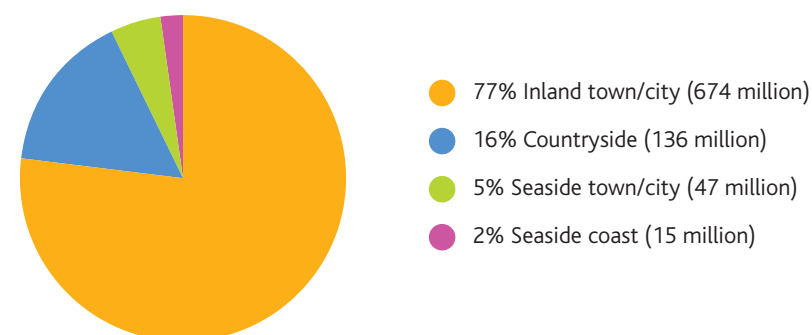
Domestic overnight trips by purpose

Source: United Kingdom Tourism Survey 2006



Destination of tourism day visits

Source: England Leisure Visits Survey 2005



Domestic tourism

Domestic tourism forms 80 per cent of total UK turnover. It has two main components. Tourism "day visits" constitute nearly two-thirds of total domestic tourism, and their number has been increasing, partly driven by a growing number of people taking longer shopping trips, who statistically count in the 'tourism day visit' figures.⁸ Domestic overnight stays make up the remaining third, the majority of them for holidays, but with a significant number of business trips and visits to stay in relatives' or friends' homes. The charts show the breakdowns.

The Olympic Games and Paralympic Games offer an opportunity to reverse the decline in overnight stays, including weekend breaks. To achieve this, we plan to:

- Consider and spell out the benefits of the 2012 Games to all UK tourism businesses – and to make it clear that these benefits are by no means restricted to those that can expect more overseas tourists.
- Create an environment in which the anticipation of the 2012 Games is translated into demonstrable growth in domestic holidaying – and this include efforts to counter negative perceptions about the effects of the Games on visitor attractions and destinations in this country.
- Improve skills and retention, product quality, and accessibility, which will generate real gains for businesses in the domestic market.

We cannot do this on our own. We need the committed involvement of the private sector, as well as the full support and involvement of the RDAs, local authorities, and other organisations in the public sector. Work across the public sector in the preparing this Strategy has helped to develop co-operation and joint working – as has the Partners for England initiative, which has made great progress in bringing together key players.

Overseas residents visiting the UK

More and more people are visiting Britain. The International Passenger Survey showed that there were a record 32.1 million inbound visits in 2006, and their spending was also a record at £15.4 billion. Despite this, the value on inbound tourism below the levels achieved in the mid 1990s (the best year for inbound visitor spending was 1996 which generated £15.9 billion at 2006 prices).

VisitBritain forecasts that in 2007 both the volume and value of inbound tourism will increase by a further 3.7 per cent, with 33.3 million visitors spending £16 billion. And London is expected to see an even bigger increase in visitors: Visit London forecasts a 4.5 per cent increase in visits and 4.0 per cent increase in spending for 2007 – 15.9 million overseas visitors spending £7.8 billion.

All this is against the backdrop of a buoyant world travel market. The number of international trips across all countries in 2006 increased by an estimated 4.5 per cent on 2005⁹. The United Nations World Tourism Organisation is forecasting 4-5 per cent annual growth until 2020.

This growth in tourism is largely the result of greater ease of travel and improved spending power in Eastern Europe, particularly countries newly joining the European Union, and stronger Asian markets in India and China. These new markets have almost made up for the failure of key established markets, including the US and Japan, to recover fully from the impact of 9/11 and Foot and Mouth Disease.

Between 2000 and 2006, inbound visits to the UK from 'emerging markets' increased by over 60 per cent, whereas visits from developed markets increased by only 20 per cent. This trend looks set to continue, with provisional estimates suggesting that in 2006 for the first time we received more income from visitors from India than from Japan. The continued eastward shift of economic activity in Europe looks set to continue: Turkey is becoming a major economic power, and we can expect more Turkish tourists in the coming decade.

However, we cannot be complacent. Continued concerns about the environment could see fewer overseas visitors, although within the UK that could also strengthen our domestic market.

Inbound tourism and the Games

One of the main economic benefit of the 2012 Games is expected to come from tourism, with the main tangible economic legacy being an increase in the number of visitors and their spending. Critically those economic benefits will not just be for London alone but could be enjoyed throughout the UK.

Latest estimates suggest the Games might generate around £2.1 billion¹⁰ for Britain's economy.

The potential impact on local NHS services of increased tourism and particularly of the increased numbers of visitors during the Games is recognised. The NHS is working closely with LOCOG to ensure that visitors to the UK during the Games can enjoy a healthy experience, which includes access to excellent healthcare where needed.

Analysis of recent Games shows that their successful tourism legacy is linked closely with the extent and potential of the host nation's existing tourism offer, and how the Games are used to improve that offer. So the Barcelona Games of 1992 created an enormous legacy for tourism, not so much because of the size or nature of the wider Spanish economy, but because at the time the potential of Barcelona as a short-break/business venue had not been exploited. Worldwide media coverage put the city's architecture, climate, and ambiance on the map. Before the Games, most Europeans considered the city to be relatively unattractive, vaguely connected to George Orwell. Afterwards, it quickly became a sophisticated attraction easily reachable from most continental cities.

Conversely, the Sydney Games were consciously and successfully used to re-position the entire Australian visitor offer. Pre-2000, Australian tourism was largely based on "once-in-a-lifetime" trips, especially from the UK, and often involving expatriate relatives. Before and after the Games, marketing was used to successfully demonstrate to potential visitors that there was enough to see and do to make a "normal" overseas holiday a worthwhile proposition, and falling air fares made it a practical choice. A high proportion of the £1.75 billion benefit was therefore from tourism over the years 1997-2004.

However, such benefits are not automatic. The Athens Games have had nowhere near the same effect – mainly due to the established nature of the Greek offer as a low-cost package destination. Indeed, poor pre-Games international publicity on prices and overcrowding led to a fall of 8-10 per cent in visitor numbers in 2004 (not just for the period of the Games events, but for the whole year). The subsequent recoveries – 10 per cent in 2005, and 2006 – have been put down to a re-positioning of the wider Greek offer, with golf and spa holidays prominent.

As Visit London's Strategic Plan for the Games makes clear, London is in a unique position compared with some previous host cities, as a highly popular visitor destination with a strong brand, and 2012 should not be seen as a significant change but as a platform to reinforce and spread the current brand.

Barcelona 1992

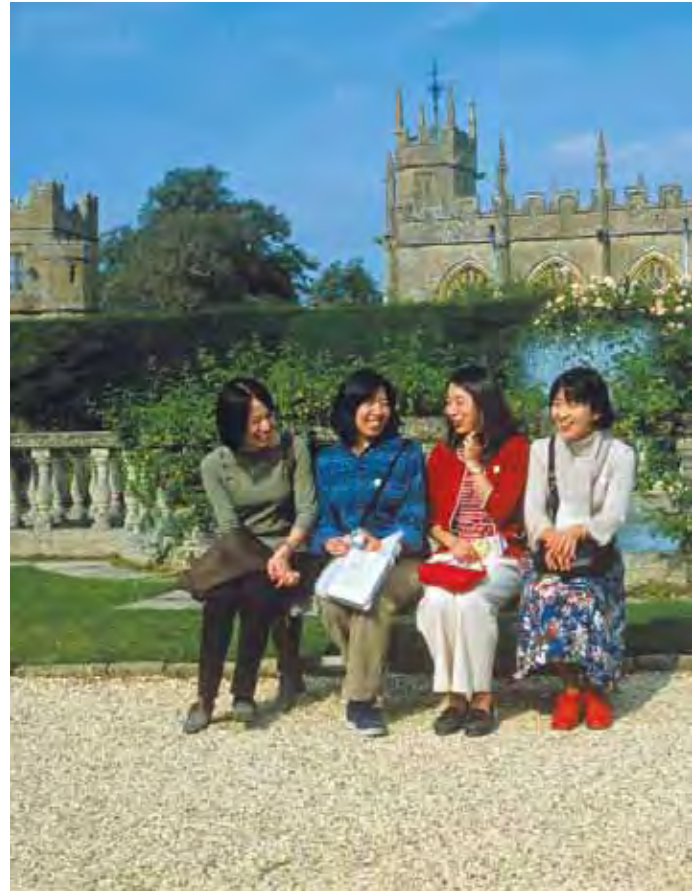
- The Barcelona Games in 1992 doubled the number of international visitors during the following decade and the city rose from 16th to third most popular short break destination in Europe.

Atlanta 1996

- The Atlanta Games of 1996 added US\$5.1 billion to the Georgia economy generating US\$1.5 billion spend from out of state visitors.

Sydney 2000

- Following the Sydney 2000 Games, interest in visiting Australia grew by more than 20 per cent across many markets as a result of increased exposure of Australia (eg USA 25 per cent, UK 22 per cent, Germany 12 per cent, Japan 24 per cent).
- The Sydney Games of 2000 generated 15 per cent more inbound visitors in September 2000 compared to that month in 1999; saw visitor numbers for 2000 as a whole up by 11 per cent on 1999; and generated 1.6 million Olympic-motivated visitors over 1997-2004, spending US\$3.5 billion.
- In the two years leading up to the Games more than 3,000 media were brought to Australia, generating an estimated US\$2.3 billion in publicity.
- Partnerships were forged with global brands such as Visa, Kodak, McDonalds and Coca Cola resulting in US\$1,700 million worth of publicity for Australia. Without the Games the level of awareness of Brand Australia might have taken 10 years and US\$6.1 billion to create.
- Brand research concluded that the Sydney Games added significant depth to people's knowledge of Australia, changed global perceptions of Brand Australia, specifically creating perceptions of a contemporary, urban culture, and most importantly generated interest in visiting Australia.



Winchcombe, Gloucestershire

Athens 2004

– The Athens Games of 2004 generated a 10 per cent increase in inbound visitors in 2005 and are expected to generate additional annual visitors of 5-7 million a year by 2009. Athens also received a TV audience of 3.9 billion, amounting to 35,000 hours of coverage on 300 channels in 200 countries.

Learning from other big events

We can also learn lessons from other international sporting events. The Torino 2006 Winter Games enabled the city to benefit from improved and increased accommodation facilities with 103 new hotels, 11,017 new beds, 4,856 new rooms and four new 5-star hotels.

Germany's hosting of the 2006 World Cup meant that 3.5 million additional bed nights were spent in Germany between January and July 2006. A Nationwide Service and Friendliness Campaign was developed to enhance Germany's image and increase future tourism by improving service standards throughout the industry. 9 out of 10 visitors thought that Germany exceeded expectations and would recommend it as a destination.

Beijing 2008, predict an incremental annual increase of 7-8 per cent between 2006-2008 leading to a total of 4.4 million extra overseas visitors spending US\$4.5 billion.

Learning from the Manchester example

It isn't just to international sporting cities that we can look for examples of how to build a strong tourist legacy. The Commonwealth Games ranks as the third largest sporting event in the world after the Olympic Games and the World Cup. The Manchester 2002 Games are widely regarded as the best ever.

The Games legacy started when the bid was presented in May 1995. Manchester City Centre had already seen substantial improvements in infrastructure, including much cutting edge architecture. Such improvements had started to coincide with earlier bids for the Olympic Games and Paralympic Games that had attracted investment which ultimately led to the largest indoor arena in Europe – the MEN Arena – attracting 20,000 people to the City almost every week to see world famous music acts.

Further venues and attractions were added including the National Cycling Centre, the Millennium Quarter, Bridgewater Hall, and the re-opened Manchester Art Gallery. The Manchester International Convention Centre and the Great Northern Square joined G-Mex (now Manchester Central) to establish business tourism for the future in a defined cultural and convention quarter.

To ensure the benefits of hosting the Games were spread to the wider region and to extend the marketing opportunities, Manchester 2002 Ltd worked closely with regional stakeholders, including Liverpool City Council.

An independent consultancy providing a report in July 2003 reported examples of the tourism benefits of the Games as:

- Tourism spending by Games participants and visitors to the region estimated at £29 million.
- Additional Tourist Information Centre facilities provided for the Games recorded nearly 250,000 walk-in visitors.
- Since March 2002, 2.5 million visits have been made to www.englandsnorthwest.com.
- The Games has contributed to Manchester Airport's predicted passenger growth of 7.5 per cent for 2003.
- A world-class range of sporting facilities for the region.
- 30 million people are now expected to consider Manchester as a business or tourism destination as a result of hosting the Games.

The continued legacy

During 2008 Manchester will host six international events worth £16.6 million, most at venues built for the Games.

Since the Commonwealth Games, Manchester has continued to enjoy sustained tourism growth, with 741,000 overnight stays in 2003¹¹, more than the traditional tourist hotspots of Oxford, Cambridge and York. Between 2002 and 2003 Manchester increased its ranking from fourth most popular destination for overseas visitors to third in the UK, only beaten by London and Edinburgh. Manchester retained this position in 2006.

All this has benefited the city economically. Between 2002-2005, tourism brought an extra £350 million a year to Manchester, and is now worth nearly £4 billion annually.

Learning from others

So we start from a strong base, with a vibrant tourism industry. But as other cities have shown, hosting the Games can boost the industry still further. We will learn from their example, while recognising the unique features of London and the UK, so that our whole economy benefits from a stronger tourism industry. In the next Chapter, we explore how we can maximise those opportunities.

Links and further information

Further information on the legacy benefits of the 2002 Commonwealth Games in Manchester can be found at www.gameslegacy.com

DCMS tourism pages www.culture.gov.uk

VisitBritain www.visitbritain.co.uk

Visit London www.visitlondon.com



City of Manchester Stadium

2. Maximising Games-related opportunities across the UK

Key points in this chapter

- The experience of cities and nations that have hosted the Olympic and Paralympic Games has demonstrated that, when carefully planned and promoted, the benefits can be shared across the host nation.
- Over the next year, we will prepare the ground for the handover of the Olympic flag after the Beijing 2008 Games. We set out a timetable from taking the baton from Beijing to the London Games and beyond.
- VisitBritain will launch a marketing strategy for the Games, with a revised Britain brand designed to reflect the energy and global appeal of the Games. Visit London is also working towards a new brand for London, linked to the Games.
- British tourism will have a strong showing at the Beijing Games, including a spectacular presentation of the city as part of the 2008 closing ceremony.
- We will ensure that the 2012 Games legacy for tourism is shared across the UK.
- A major cultural programme is being developed alongside the sporting elements of the Games. The Cultural Olympiad will include major international festivals: a World Cultural Festival, the International Shakespeare Festival and an International Museums Exhibition. And there will be a UK-wide cultural festival of community cultural projects.

Key actions

Other cities which have hosted the Games show how strong marketing and branding can help to sustain an increase in visitors. DCMS is working closely with its public and private sector partners to ensure not only that these benefits are maximised, but that they are spread across every region and nation of the UK.

In order to do this, we propose the following six key priorities:

- A phased approach to marketing, branding, and the other areas of the Strategy.
- A national public and private sector tourism marketing campaign – aimed at both the domestic and international markets, and starting at the Beijing handover in 2008.
- Full London and Britain Brand Reviews.
- Close working between VisitBritain, Visit London, and the London Organising Committee of the Olympic and Paralympic Games (LOCOG) in the marketing of the Cultural Olympiad.
- Comprehensive, innovative and striking presences for both London and Britain in Beijing for the handover.
- Further development of the London's Events strategy and partnership work on other major events strategies.

Additionally we will:

- Work with our partners to avoid displacement with the domestic market, transmit the message that the regions are "open for business" during the Games and ensure complementary marketing of the regions.
- Take full advantage of the Cultural Olympiad.

The experience of cities and nations that have hosted the Olympic and Paralympic Games has demonstrated that, when carefully planned and promoted, the benefits can be shared across the host nation.



Opportunities for VisitBritain and Visit London

Central to maximising the opportunities for domestic and international tourism afforded by the Games are our national and London tourist authorities, VisitBritain and VisitLondon.

VisitBritain has a unique opportunity to strengthen Britain as a tourist destination in an increasingly competitive environment, working with Government (including the devolved administrations), the RDAs, UK Trade and Investment, the British Council and the London Organising Committee of the Olympic and Paralympic Games.

For Visit London, the Games present the opportunity to strengthen and share London's established brand in the world and at home. The Games will help the city to compete globally for market share across different sectors of international promotion – in culture, inward investment, the creative industries, film and education, as well as in tourism.

The domestic market

VisitBritain will create specific PR/marketing strategies designed to persuade UK residents of the benefits of staying in England during the Games. A special campaign starting in January 2008 will emphasise the arts, dance and musical events of the Cultural Olympiad. There will also be much publicity around the Torch Relay in 2012. Tourist Information Centres across England will have targeted information for Games-related visitors.

London, in particular, has a great opportunity to market its vibrancy at home, encouraging more British visitors to spend time in the capital.

The RDAs and their Destination Management partners, and local authorities, will be fully involved in this work, working through their Partners for England forum.

We know that some host cities have seen a reduction in domestic visitors because people fear "building sites" in the run-up to the Games or overcrowding during them. Defying the displacement effect is therefore a major challenge. Innovative new marketing and PR programmes will be used to stimulate domestic interest in the Games, make it clear that London is "open" and underline the excitement of activities associated with 2012.

The international market

Overseas, both VisitBritain and Visit London will actively exploit overseas marketing and PR opportunities in:

- Long-haul markets (especially the United States, Canada, Japan, Australia and New Zealand).
- Emerging markets (China, India, Russia, Brazil, Mexico, South East Asia and Eastern Europe).
- Short-haul markets (France, Germany, Spain, Italy, Ireland, Scandinavia and the Benelux countries).

In this, both organisations will work to position London and Britain as “must-see” destinations. We will also:

- Maximise the potential of visitors coming to see friends and relatives.
- Maximise exposure for the Cultural Olympiad.
- Maximise the benefits that increased corporate sponsorship brings.
- Ensure that the industry has accurate and up-to-date information.
- Use the Games to attract the youth market.
- Counter competitor marketing and encourage visitors not to defer their trips until nearer, during, or after the Games.
- Maximise the legacy with effective post-Games marketing.



Glasgow, Strathclyde

Phasing the strategy

We consulted last year on a proposal to give each year from 2008 to 2012 a cultural, artistic, or sporting theme. However, most respondents felt that this approach could have the effect of restricting marketing campaigns. We agree with this.

DCMS and its partner bodies believe that a generic, phased approach would be effective. This is set out in the timetable below.

Phase 1

2007: Preparing the Ground

- Building key relationships with Games stakeholders and potential partners.
- Integrating the London 2012 Olympic and Paralympic Games with long-term tourism planning.
- Agreeing all the guidelines for the respective brand values.
- Previewing the Cultural Olympiad and Liverpool 2008.
- Finalising the Beijing 2008 activity programme and related partnerships.
- Developing events strategies and partnerships.
- Continuing to learn the lessons of previous Olympic and Paralympic Games for tourism.
- Drawing up a welcome visitor charter.
- A major tourism campaign for the handover night.

Phase 2

2008: Taking the Baton

- Supporting the Beijing handover with tourism-specific activities.
- Launching and promoting the Cultural Olympiad/ Liverpool 2008 to international and domestic markets and engaging widely with the cultural sector across Britain in 2008.
- Establishing relationships with the main broadcasters.
- Launching a four-year public/private sector marketing campaign to welcome the world.
- Recruiting businesses into quality improvement programmes linked to the London 2012 Olympic and Paralympic Games.

2009: Building Momentum

- Building awareness of the Games and establishing relationships with official Games tour operators in all key markets.
- Showcasing London and Britain to international event and incentive planners.
- Finalising international and domestic marketing strategies up to 2012.
- Integrating the London 2012 Olympic and Paralympic Games into all Britain brand and public diplomacy activities.
- Developing detailed media management programmes.
- Providing front-line contacts in the international travel trade with tools and information.

2010: Galvanising Britain

- Developing a UK-wide campaign, encouraging businesses to “roll out the red carpet”.
- Rolling out international Olympic and Paralympic Games marketing/promotional activities linking to domestic health/activity campaigns.
- Creating an unaccredited media and travel writers’ centre.
- Leveraging relationships with Canada and India regarding Vancouver 2010 and Delhi 2010 to benefit UK tourism.
- Preparing a post-Games strategy.

2011: Inviting the World

- Providing all ticket applicants with tourism information relating to the whole of Britain including how to be part of 2012 outside of London.
- Reinforcing “don’t stay away” and “don’t go away” messages to potential “Games avoiders”; running “test” media events.
- Identifying and refining post-Games marketing opportunities and strategies.

Phases 3 and 4

2012: Welcoming the World and Defying the Displacement Trend

- Providing a first-class welcome and comprehensive information for all Olympic and Paralympic Games visitors.
- Supporting UK businesses in their delivery of positive visitor experiences.
- Providing Britain-wide content to the media.
- Hosting targeted hospitality activities aimed at world travel leaders.
- Maximising the tourism PR potential of the Olympic and Paralympic Torch Relay and other events.
- Working with the BBC and other broadcasters.

Phase 5

2013 and Beyond: Cementing the Legacy

- Maximising post-Games success stories in international and domestic PR.
- Exploiting positive Games legacy outcomes for tourism.
- Launching post-Games success stories and marketing activities.
- Encouraging the industry to build on the gains made in the run-up to 2012.

Co-ordination and marketing

In addressing these priorities Visit London and VisitBritain will work closely with their regional and national partners in the public and private sectors. In particular, they will build on their existing relationships with LOCOG, fully adhering to its and the International Olympic Committee's (IOC's) principles and regulations in the use of London 2012 branding. There will also be a key role for the England Marketing Advisory Group domestically in relation to the Games. There will also be co-ordinated use of marketing resources with the RDAs, and local authorities, through Partners for England and the Nations and Regions Group.

Developing a strong visitor awareness

From 2008, a stronger brand for Britain will help potential visitors see what Britain has to offer. VisitBritain will launch its marketing strategy for the 2012 Games at the end of the year. Their new brand will reflect the energy and worldwide appeal of the Games. A Marketing Consultation Group including the tourism industry's leading marketing and branding professionals will be set up shortly. The Group will meet at key stages in the marketing/brand development programmes.

Through this process, VisitBritain hopes to develop a strong destination brand for Britain. We will make it easy for hotels, visitor attractions and other tourist facilities to use the brand. We will also ensure that our marketing around the Games meets the needs of all our stakeholders. VisitBritain will also work with relevant Government departments to ensure a single approach to marketing Britain as a destination.

The London brand

Visit London is leading work towards a new 2012 brand for the capital, which will help to promote the city to the full range of potential visitors. They are working closely with London Unlimited, which has a wider remit to develop a global brand for London that positions London as the best city in the world in which to invest, visit, study and conduct business.

Britain at Beijing 2008

The Beijing Games are an excellent opportunity to market what Britain has to offer visitors. So we will be well represented there. In particular, we will ensure that the ceremony to mark handover of the Olympic flag at the end of the Games provides a spectacular presentation of London.

VisitBritain will partner the British Olympic Association at their Team GB Lodge – a centre for all British athletes, media and sponsors – in Beijing. The Britain Pavilion alongside the Lodge will showcase the UK's cities, regions and sporting facilities. This exhibition will be complemented by high profile networking, cultural and hospitality events. A series of London "nights" will reflect the cultural breadth of London and tie in closely with the London 2012 Cultural Olympiad.

The handover

LOCOG is already developing an extensive programme of activities to mark the Olympic handover from Beijing to London, ranging from the closing ceremony presentation to events throughout the UK to highlight 2012 Games' venues and activities. VisitBritain, its public diplomacy partners and Visit London will also use their marketing to enhance global international perceptions of London and Britain as hosts for the next Games in 2012.



Notting Hill Carnival, London

Spreading the benefits

The Olympic Games and Paralympic Games present opportunities for the whole of the United Kingdom to enhance its tourist industry, attract more visitors and share in the economic legacy of the Games.

Some regions outside London will benefit directly from the Games through the Cultural Olympiad, the training camps and hosting the Games themselves, but the legacy of the Games will only be achieved if the improvements identified in this Strategy are delivered and the quality of the visitor experience is improved.

This is a challenge for all those who help support tourism – the Scottish, Welsh and Northern Ireland administrations and the Regional Development Agencies in the English regions. We will also work closely with the Local Government Association and other tourism bodies under the Tourism Together umbrella.

The ambitions of this Strategy are designed to fit well with the Nations' and Regions' own tourism and 2012 strategies, and are expressly intended to act as an additional catalyst for delivery at regional and local levels. The DCMS Ministerial Advisory Group provides an important forum to help realise the benefits across the country.

The Partners for England initiative¹² is working to develop the co-ordination of strategic leadership, research and statistics, place-shaping, destination management and marketing of English tourism. Their future plans include the development of a charter for destination management; work towards a closer alignment of leisure and business tourism marketing; an improved partnership for tourism data and intelligence; and steps toward strengthening tourism leadership and co-ordination structures.

VisitBritain and Visit London can also help the industry to improve how it operates in areas such as its customer focus: its product; campaigning and destination marketing; using modernising communications channels; measuring the value of marketing; and developing tourist information centres. Such efforts reflect the resolve of tourism partners to pursue a collaborative approach to improve the experience of visitors and the marketing of Britain as a destination.

Nations and regions

Each nation and region will determine its own priorities and opportunities. Working through the Nations and Regions Group¹³, they are developing strategies to maximise the regional benefit from the Games. Their proposals complement the existing tourism strategies of the Devolved Administrations and the RDAs.

Many priorities, such as improving skills and quality of visitor experience, are shared throughout the UK. Each region and nation also has its own priorities for tourism and 2012. Some will seek to capitalise on existing major events, such as the North West with Liverpool 2008 (as City of Culture). Others will focus on existing potential such as Northern Ireland with Belfast's Titanic Quarter.

Other areas benefit from a very specific Olympic or Paralympic heritage – the West Midlands, home to Much Wenlock in Shropshire which inspired the modern Games and in the South East, Stoke Mandeville in Buckinghamshire where the Paralympic Games were born.

Many English regions, including Yorkshire and the Humber, the North East and the East Midlands, will focus on the opportunities for sports tourism, while Scotland is aiming to increase business tourism. The Cultural Olympiad and its many opportunities is a magnet for some areas, from the South West with its world-class heritage to the West Midlands and its Shakespeare links. Others will use 2012 to raise the profile of their region or nation – in particular the East of England, the West Midlands and Wales.

All the regions and nations are developing approaches similar to those described in this Strategy to improve quality, accessibility and sustainability. Below we describe how each region is developing its own strategy for 2012 in the context of its particular heritage and circumstances.

North West – the region's priorities are to ensure improvement of the offer made by the tourism industry, and to maximise the legacy generated by the Games. As part of this, North West will: take a proactive approach to events in the period leading up to and beyond 2012, bidding for new, major, high-profile events; highlight Liverpool 08 as a forerunner to the Cultural Olympiad for the nation; work with industry to create bespoke travel packages for Games-related tourists; focus on increasing overseas visitor numbers to the region; increase the number of tourism businesses providing world-class standards of service; maximise the impact of the Cultural Olympiad; increase the number of tourism businesses trading online via EnglandNet; make the most of any pre-Games Training Camps in the region, and use the Games-related business base to build the skills of people working in the tourism sector. Further details are available in the 'Be Inspired' strategy
www.nwda.co.uk/publications/quality-of-life/be-inspired---northwest-legacy.aspx

West Midlands – is promoting itself as a world-class place to visit and do business; is building on its Olympic heritage; attracting new business tourism, arts and sports events; showcasing the cultural heritage (particularly its associations with Shakespeare) and developing themed breaks and sports tourism opportunities.



Selfridges, Birmingham

South West – has produced a Legacy Strategy for the 2012 Games which focuses on the interlinking themes of business development; tourism and regional image; sporting opportunity; cultural celebration; and community engagement. Priorities for tourism include improving the welcome, accessibility and the quality of the product. The importance of capitalising on the Games opportunity will be communicated to the region's businesses through industry conferences and workshops. To add to the region's offer, a comprehensive and sustainable events programme will be developed before, during and after the Games in line with the regional Cultural Olympiad programme. The region will host the Olympic and Paralympic sailing events at Weymouth and Portland, against the stunning backdrop of the World Heritage coast. Further details are available in the Team South West Legacy Strategy www.southwestrda.org.uk/region/london2012/download/publications-1.shtm

South East – is raising its international profile; benefiting more from visitors using the region as a gateway to London; attracting conferences, conventions and exhibitions; celebrating the region's historic links to the Paralympic movement and effecting a culture change for disabled people; and capitalising on the South East's many cultural festivals. Further details are available in the Compete, Create, Collaborate strategy.

Yorkshire and the Humber – is staging major sports events to raise profile and plans to host a successful UK Schools Games in Sheffield in 2011. Further details are available in the Yorkshire Gold strategy at www.yorkshire-forward.com/www/view.asp?content_id=6602&parent_id=17

East of England – is scoping out the feasibility of a Convention Centre; promoting awareness of the region – particularly its cultural assets and sport; and encouraging hotel investment. Further details are available at <http://2012.emda.org.uk>

North East – is capitalising on its passion for sport and activity and leisure-based tourism; developing a network of world-class sports facilities; aligning promotional and marketing campaigns with sports branding; increasing visits throughout the year and seeking to take advantage of visitor displacement.

East Midlands – is encouraging greater numbers of staying visitors and visitors from non-core markets – those which are not the usual ones from which they draw their visitors – and planning sports and cultural activities.

Scotland – *Tourism Framework for Change*, published jointly by the Scottish tourism industry, the Scottish Executive and other public sector agencies last year, sets out an action plan for making the most of the opportunities provided by the Games. It seeks to improve quality and skills in the sector; address customer needs and predict market trends in improving facilities; improve the use of e-technology; and improve the transport infrastructure – all with a focus on sustainability. The Scottish Executive and the Scottish tourism industry will work together to build on the *Tourism Framework for Change* in order to maximise the opportunities made available by London 2012.

Wales – is developing Wales branding so that all involved in tourism can reinforce consistent branding messages; continually raise accommodation quality standards to meet rising visitor expectations and attract and promote more high quality flagship attractions that reflect the character and culture of Wales; create partnerships. Tourism is a fragmented industry in Wales so it is important for people, businesses and organisations to work together in an efficient way. These priorities will largely be taken forward through Visit Wales' working with other departments and bodies as necessary.

Northern Ireland – development of Belfast’s Titanic Quarter, with 2012 centenary celebrations and related maritime/heritage calendar of events; realisation of five Tourism Signature Projects; innovative development for tourism products, especially in relation to Cultural Tourism, Events and Festivals (preserving and showcasing the authentic cultural elements); augmenting Northern Ireland’s appeal as a golfing destination; full development of the world-renowned Causeway Coastal Route and other strategic driving trails; further development of Northern Ireland as a world-class Business Tourism Destination.

Local authorities

Local authorities, especially those covering our leading resorts and destinations, make an enormous contribution to the tourism sector through their substantial discretionary investment; delivery of their statutory regulatory duties; and their wider responsibilities for local infrastructure and economic development.

Many essential services such as street-cleaning, public toilet provision, signage and community safety measures benefit local businesses, residents and visitors alike. Leading destinations have a great deal of experience and expertise in managing them for visitors as well as residents. This will in turn enable the welcome we envisage in Chapter 5.

The Local Government Association (LGA)’s Culture, Tourism and Sport Board has designated the 2012 Games as a priority project. The LGA Network will help local authorities to share best practice, ideas, news and issues on the Games. Opportunity for local level involvement and participation in the Tourism Strategy will also be developed through the Partners for England initiative.



Edinburgh

Taking this work forward

DCMS, VisitBritain, the Nations and Regions and our other partners will work together¹⁴ to:

- Help communicate the scale of the opportunity to the sector; develop a 2012-based events programme; develop and coordinate marketing and promotion; drive up quality and improve destination management; improve the skills base; address better access for visitors with disabilities and develop the product and the overall offering.
- Avoid “displacement” within the domestic market, by ensuring that the focus on the Games does not cause a reduction in the domestic sector and enables a more co-ordinated approach to marketing via initiatives such as Partners for England.
- Transmit the message that the regions are “open for business” during the Games season itself, along with more specific promotions and information provision aimed at linking Games-related tourism to the regions.
- Ensure complementary marketing of the regions over the medium term, through VisitBritain’s co-operation with regional partners and through the Partners for England initiative.
- Take advantage of the Cultural Olympiad opportunity, in particular the UK-wide Cultural Festival.
- Ensure that facilities are available for those with disabilities. A detailed programme of improvements is set out in Chapter 4.

The Cultural Olympiad

In its bid to host the Games, the Government set out its aspiration to develop a cultural programme alongside the sporting elements of the Games. The Museums, Libraries and Archives Council reported that expenditure by international tourists to Australia who participated in cultural activity increased by 30 per cent following the 2000 Sydney Games. We want to see similar benefits here.

The Cultural Olympiad will encompass the widest possible range of culture: from the arts, museums and galleries, to the historic and built environment; to libraries and archives, to the moving and digital image; from the biggest institutions to the smallest community groups. Major public areas, both in the capital and across the UK, will be the settings for a whole host of live events, including music, dance and comedy, in addition to the sporting events themselves.

The three main elements of the Cultural Olympiad will provide excellent opportunities to boost the visitor economy:

- **The mandatory ceremonies:** including the Opening and Closing Ceremonies of the Olympic Games and the Paralympic Games; the Medal Ceremonies; the Torch Relay and the welcome of the athletes to the Olympic Village.
- **Bid projects:** these include a World Cultural Festival, the International Shakespeare Festival, live sites around the country and an International Museums Exhibition.
- **UK-wide cultural festival:** drawn from grassroots community projects, to engage local communities, increase participation and attract visitors.

To gain the full benefits:

- VisitBritain, Visit London, the Regional Development Agencies and other partners will work through the Culture and Creative Advisory Forum to advise the Government and LOCOG on how to ensure that the tourism industry maximises the opportunities offered by the Cultural Olympiad.
- A network of regional Creative Programmers is being set up in the eight English regions outside London¹⁵. Working alongside the Regional Cultural Consortia, they will facilitate and co-ordinate the regions' participation in the Cultural Olympiad in the run-up to the 2012 Games. They will help ensure that events complement existing local tourism initiatives and events strategies. They will also develop and implement a communications and marketing strategy in consultation with destinations.
- DCMS will continue to work with the tourism industry to maximise the opportunities of the Cultural Olympiad as it develops.
- A small team will be established within London from autumn 2007 to ensure that the 2012 cultural programme engages London's rich cultural and creative sector and diverse communities.



Natural History Museum, London

3. Business visits and events

Key points in this chapter

- The Olympic Games and Paralympic Games are an excellent opportunity to reinforce Britain's reputation as a world-class destination for business visits, conferences and events. We need to ensure that our facilities match the best in the world.
- Business tourism – with 8 million visits during 2005 – already accounts for a quarter of all overseas visitors and 31 per cent of inbound tourism income. Business visitors spend more and are great ambassadors.
- The business sector also helps to sustain the wider tourist infrastructure, filling seaside hotel rooms for conferences out-of-season and supporting urban regeneration through new conference facilities in cities like Manchester, Glasgow and Cardiff.
- VisitBritain is working to maximise business tourism by encouraging conference organisers to come to Britain. eventBritain has been developed as a dedicated events unit offering them specialist support.
- Events for London has been established as a one stop shop for anyone staging an event in the capital. We support proposals for a major new International Convention Centre in London.

Key actions

Our objectives are to:

- Maximise the opportunity and platform provided by the 2012 Games by increasing the number of business visitors attending business events taking place in London and in the UK.
- Ensure that London and the UK are perceived internationally as a world leader in holding business events and conferences.
- Secure VisitBritain's position as the premier organisation for British business visit and event marketing, and a world leader in adding value to sourcing, bidding for and winning business.
- Deliver maximum incremental economic, social and cultural benefit to London and UK residents and communities through major events programmes for the capital and the country.
- Develop a process of ministerial support for events.

With VisitBritain and Visit London, we will deliver these objectives by:

- Explicitly focusing on "winning business" by targeting.
- Using the platform of winning international association events (and the "halo" of the London 2012 Olympic and Paralympic Games), as a basis for winning more sporting and cultural events.

We have a great opportunity with the 2012 Games to upgrade our facilities for business visitors and to reinforce our reputation as a leading location for conferences and events.



- Improving our ability to adapt by evaluating changes in business visits and events activity to capture business won in the year it is booked.
- Refining the Britain brand to reflect business visits and events.
- Exploiting partnerships between VisitBritain and Visit London with UKTI on trade and professions association events and DCMS on sporting and cultural events.
- Taking advantage of best practice, and ensuring better brand consistency.
- Ensuring assimilation of Best Value and Excellence into mainstream activities.
- Proactively building relationships with the destinations and regions and other bidding partners, enabling VisitBritain to respond to specific requests for support, ensuring higher conversion rates.
- Ensuring higher delegate and attendee levels at events using the marketing and PR capabilities overseas.
- Through Events for London, reinforcing London's international profile and image and celebrating and promoting the capital's diverse communities, vibrant creative life, inclusiveness and sustainability.
- Continuing to support work to bring forward a London International Convention Centre within the central tourist area of the capital.

Business tourism: the facts

- 8.17 million inbound business visits were made during 2005, contributing over £4 billion in spend – this represents 27 per cent of total inbound visits and 28 per cent of total inbound spend. Visits are up by 9 per cent and spend is up by 10 per cent on 2004 figures.
- Total UK business travel was worth £22.1 billion in 2004 and is projected to rise to £33.8 billion by 2012 (World Travel and Tourism Council). Business visits are increasing and predicted to rise at a faster rate than any other tourism sector up to 2010 (World Trade Organisation).
- Business visits are particularly important for England's regions, for example, accounting for 40 per cent of inbound visits to the West Midlands.
- Business visits are also crucial for seasonal spread with 50 per cent of the value being delivered October to March (International Passenger Survey 2005).
- 84 per cent of business travellers (or 22.9 per cent of total visitors) are individuals visiting Britain for a specific business need (ie that their travel is less discretionary).
- The remaining 16 per cent of business visitors are more easily influenced. These are delegates at conferences, exhibitions, incentive programmes and other events. Their average spend per day is more than twice that of the typical leisure visitor. So although they account for just 4.3 per cent of total international tourism by volume, they account for 6 per cent of value, or nearly £900 million.

The opportunity

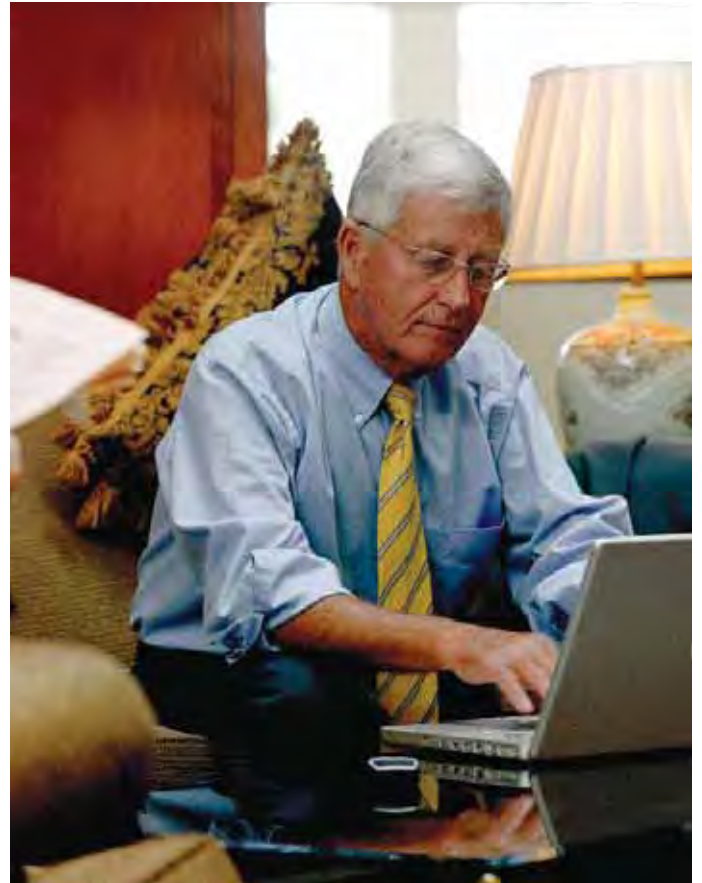
We have a great opportunity with the 2012 Games to upgrade our facilities for business visitors and to reinforce our reputation as a leading location for conferences and events.

To do so, we will develop a specific strategy targeted at this group. There is an increasingly competitive market with attractive overseas destinations, and we cannot rest on our laurels.

Five in every six business visitors comes for a specific meeting: their visits are non-discretionary. But conferences are discretionary, and their delegates are the most valuable visitors of all.

So we must reach those who organise conferences and events and strongly encourage them to come to London and the UK.

London, and the UK generally, already provide world-class destinations for business visits, conferences and events. The 2012 Games provide an opportunity for us to permanently establish ourselves as the envy of our international competitors by providing new facilities, promoting our best existing facilities and upgrading those that need improvement.



Newport

Economic regeneration and business tourism

For many towns and cities, developing a first-class business infrastructure can go hand in hand with urban re-generation. Business visits complement the leisure tourism sector and rely on much of the same physical infrastructure. They bring business to destinations – such as seaside resorts – which would otherwise be dependent upon a relatively short summer season. Investments in business visit facilities have recently helped regeneration in Birmingham, Belfast, Cardiff, Glasgow and Manchester.

Many of the investments in a destination's infrastructure are designed primarily to attract business visitors (hotels, transport and communications facilities, restaurants, attractions and amenities, conference auditoria) and these provide benefits which can also be enjoyed by the leisure tourist and local residents.

Business visits are more resilient than other tourism sectors. They are less affected by economic downturns or external calamities.

Future benefits

Significantly for the longer term legacy of the 2012 Games, business visits stimulate future inward investment as business people see the attractions of a destination and then return to establish business operations here. Business visitors can also become unpaid 'ambassadors' for a destination by communicating to colleagues and others their positive impressions and favourable experiences.

Furthermore, conference and incentive visitors are inevitably brought together as a group, so that it is possible to inform and educate them about the local community in which their event is being held. This serves to maximise the enjoyment of their stay as well as minimise any disruption and possible inconvenience to local residents. It is much harder to manage, in the same way, the impact of individual leisure travellers on a destination.

Better research

Business and event tourism can bring huge economic benefits. But as this is a highly competitive market, we must be sure that we meet the needs of the sector. Our facilities must be of the highest standard. And the sector must have the intelligence in a fast-changing world to respond to new requirements and to make the most of new technologies and approaches.

So we need a more robust and consistent methodology and better research in strategic planning, targeted at this sector. We will therefore identify and prioritise the sector-specific research needs of Britain's business and major events industry. VisitBritain will also revise its business visits and event strategies with a greater emphasis on customer focus and research.

As a result of a recent study by KPMG – which showed a greater economic and employment impact on the West Midlands region from the business visits and events sector than was previously thought – VisitBritain will investigate the delivery of a similar nationwide economic and employment impact study in autumn 2007. A report setting out options should be ready in 2008.

Improving quality to maximise the opportunity

To meet this increased demand, the industry must ensure that the conference venues are fit for purpose and of a standard expected by international and domestic clients.

The Business Tourism Partnership supports VisitBritain's current efforts to bring a set of quality standards to the provision of conference and meeting facilities within hotels and other venues (see next Chapter). This will include improved accessibility for visitors with disabilities.

The Meetings Industry Association has launched a new accreditation scheme that will become an industry standard to provide conference and event organisers with a recognisable benchmark; depending on its success within the pilot period, this could be extended leading up to 2012.

Winning new business

VisitBritain is revising its strategies for business visits and events – with a greater emphasis on winning business for Britain and close working with the Department for Businesses, Enterprise and Regulatory Reform (DBERR), UK Trade and Investment and Regional Development Agencies. The Business Tourism Partnership, which represents the leading trade associations and Government agencies involved fully supports the proposals within this Strategy.

As we have seen, conference delegates are the most valuable discretionary part of the business tourism sector and delegates are also the biggest spenders. So our efforts will be concentrated on persuading event and conference organisers to locate in London or the UK.

Our approach will have two key elements: we will demonstrate VisitBritain's ability to assist in the winning of more events for Britain; and we will work to encourage business tourists to extend their stay in Britain before or after their conference, tapping into the growing "business extender" market.



Water-bus service, London

Co-ordination of business tourism

Our consultation document suggested that a joint VisitBritain/Visit London Business Tourism Unit should be established to deal with business tourism. Such a unit would only be useful if it worked with existing agencies and if the involved regions were represented.

However, following the consultation, VisitBritain will investigate the establishment of a Business Tourism Steering Group, which would work with the Marketing Advisory group to ensure effective coordination of all activities relevant to developing business tourism activities from the Games.

This would be supplemented by a wider Business Tourism Forum representing wider business tourism interests and where practicable there should be a joint approach with some joint budgeting to avoid duplication. The Business Tourism Forum would be an integral part of the generic Tourism Steering Group which would include representatives of the Nations and Regions.

VisitBritain will also continue to work through the Nations and Regions Group to ensure that a significant proportion of new business generated by the Games accrues to parts of Britain other than London. VisitBritain already has channels of communication to different stakeholders groups and onwards to their own stakeholders (for example through the Interboard meetings, VisitScotland, Visit Wales, Visit London and VisitBritain), the British Tourism Development Committee and the Business Tourism Partnership.

National support for events bids

There are, for example, no standard mechanisms for generating letters of support for event bids from the Prime Minister, relevant ministers, industry figureheads or royalty. VisitBritain will develop with DCMS a process to involve ministers in securing more events, and position itself as the primary point of contact for bidding organisations when they want to secure letters of support or ministerial presence at events.

The events programme

Visit London and VisitBritain will use the Games to continue their work to promote London and other parts of Britain as an ideal place to host major events. They will work together through a Memorandum of Understanding covering activities relating to the Games, as explained in Chapter 8. As explained in Chapter 2, many of our regional partners are also looking for ways to attract events to their areas and Glasgow's bid for the Commonwealth Games in 2014 will build on the legacy of 2012.

VisitBritain will seek to match events to the most appropriate locations, ensuring that conference organisers have all the support they need in choosing a UK destination.

eventBritain

VisitBritain is currently working with Britain's sporting, cultural and business events sectors to secure additional events, and more business visitors, in the run-up to and beyond 2012. The strategy will use VisitBritain's national strengths to complement the existing activities of national, regional and city partners.

eventBritain (a dedicated events unit) was created to develop activities that will be accessible to bidding partners to support and add value to their bids. No one framework will suit all partners and all activities must maximise the value of each bid whilst avoiding any duplication of effort.

Key activities will revolve around:

Best practice – VisitBritain can act as an expertise "exchange" – bringing together specialist skills to develop a global best practice brief.

Brand – the 'Britain Brand' is currently primarily focused on leisure travel. VisitBritain must lead on developing the Britain/Olympic brand to effectively engage events sector audiences.

Government support – VisitBritain has a crucial role to play in ensuring that the Events sector gets the support it needs from Government, including letters of support and attendance at events.

Key account management – VisitBritain's overseas offices and personnel are a unique asset in a sector still driven by personal contact and engagement.

Marketing – VisitBritain has extensive experience in marketing events to prospective overseas visitors. VisitBritain will marshal these capabilities to maximise business visits.



Newcastle-upon-Tyne

Best prospects in sport – UK Sport will lead on the 26 major Olympic Sports. VisitBritain will focus on partnering national/regional/city bodies to focus on small/medium-sized events outside UK Sport’s current strategy. VisitBritain will help match destinations and regions to potential events.

Extenders – VisitBritain will ensure there is plenty of information on its websites to help those wanting to extend their business visits into leisure trips.

Evaluation – VisitBritain will commission a nationwide economic impact study as well as pooling available research to provide clear and useful information.

London events

Events for London is a joint initiative between Visit London, the London Development Agency and the GLA. Its ability to bring together all the relevant organisations – police, transport, the boroughs and Government – into one expert body will help it to secure events for the capital, offering a single point of contact for conference and event organisers.

Events for London will develop a major events programme for the capital, clearly reflecting the wider London brand. By bringing more events to the capital, there will be a wider social and economic impact: more jobs, more investment, better living standards and improved facilities.

Events for London will undertake three key tasks:

- **Develop new events** that can effectively complement the city’s cultural offer, and reflect the diversity and richness of London’s creative life. Events for London aims to respond to the evolving needs of a multicultural and demanding audience, exceeding the expectations of Londoners and visitors.
- **Grow existing events** working with key stakeholders, Events for London aims to realise the full potential of existing events and will identify successful local events that have the capability to acquire an international scope and optimise their positive impact on London.

- **Attract major international events** that can deliver maximum benefit to London. International festivals and forums will allow London to use culture and arts as catalyst for regeneration and local economic growth.

To achieve these tasks, Events for London will:

- **Reinforce London’s international profile and image** by seeking to attract and develop major events that can showcase the excellence and uniqueness of the city’s sports and arts. Through media coverage, London will be able to raise its profile and reinforce its reputation.
- **Celebrate and promote London’s diversity.** Events will be promoted and supported that clearly reflect and celebrate London’s diverse communities and vibrant creative life.
- **Support inclusiveness and encourage participation.** All Londoners will be encouraged to enjoy the events. Major events will bring Londoners and visitors from different communities and backgrounds together, and will help to create a sense of shared interests, culture and dialogue.
- **Ensure sustainability and generate clear and measurable benefits** for the city. Events for London will assess the economic impact as well as cultural, social, environmental and educational benefits when evaluating each event. Londoners should be the key beneficiaries of events. Local economic and cultural development will be valued and special attention will be paid to city image and identity, and citizens’ pride and ownership.

In developing the programme, special emphasis will be put on attracting events that ensure international scope in terms of participants, visitors and media coverage; on developing indigenous events that have the potential to expand into exceptional major sporting or cultural happenings; and on creating flagship sporting and cultural festivals and events that reflect and represent London's unique identity and cultural diversity.

Through attracting events that generate economic activity for London from domestic and international visitors, Events for London is already beginning to realise the economic legacy for the capital by converting interest generated by the Games into additional showcase events for the city.



Wimbledon tennis championships, London

Events linked to the Games

There are a significant number of events directly associated with the Games, and VisitBritain will use the Games to increase attendance at familiarisation visits before 2012. It will promote Britain as a destination for conferences, incentives and meetings for the many companies linked to the Games, including those in the health and construction sectors.

VisitBritain will maximise the opportunities of the Cultural Olympiad, and of sporting world championships and test events being staged in Britain before the Games (either for existing events to which these might act as an added draw, or in the bidding for new events that could become major spectator/participation opportunities in their own right).

In partnership with the regions and nations, it will help to bring major sporting and cultural events to Britain that link to the locations that the National Olympic Committees (NOCs) have chosen as bases for their training camps. It will also use its developing database of major sporting and related events between 2008 and 2020, to help to identify, prioritise and successfully bid for the most promising events. This activity will be carried out in partnership with regional, national and international sporting bodies.

The International Convention Centre proposal

Although there are a growing number of excellent conference facilities around the UK, there is a growing feeling that London needs its own International Convention Centre (ICC) to maximise the potential of the Games in attracting business tourism to the capital. Parts of the industry strongly believe that the lack of a world-class, purpose built ICC could lead to London losing out on potential business. We consulted on the issue last year.

Following a feasibility study and consultation, an independent Mayoral Commission set up by the London Development Agency identified a significant market gap and concluded that a new ICC for London would provide a major boost to business tourism both in London and in the UK.

The Commission's report, endorsing KPMG's analysis [ICC Final Report, October 2005] advised that a London ICC would generate £400 million a year in net incremental direct expenditure for the UK and create at least 5500 jobs. The Commission recommended that, to achieve maximum benefit, the centre should be located in London's central tourist area. A suitable central location for a London ICC is being identified and detailed work on cost and viability is now well underway.

There has been some concern that a new London ICC could displace existing business elsewhere (for example the International Conference Centre in Birmingham, and the Arena and Conference Centre in Liverpool due to open in 2008). These are reasonable concerns. However, DCMS and its partners in this Strategy believe that there is potential demand for all these large convention centres, and a new London ICC would reflect genuine market growth. It would have significant and positive effects on the UK's international competitiveness.

Links and further information

DCMS www.culture.gov.uk

VisitBritain www.visitbritain.org

London Development Agency www.lda.gov.uk

Meetings Industry Association www.mia-uk.org

eventBritain www.eventbritain.co.uk

Business Visits and Events Partnership

www.businessvisitpartnership.com



Seaham, County Durham

4. Welcoming the world

Key points in this chapter

- We need to do all we can to ensure that overseas visitors receive a welcome second to none when they come to Britain.
- Britain has a strong brand – top place on the major national brand index – but we score only 16th out of 38 for the welcome we offer. We must do better. This means cutting delays and improving arrival facilities at airports and ports, on planes, trains and ferries.
- This is a challenge for everyone: from those providing transport links to those providing accommodation. Our success here will determine the Olympic legacy for tourism.
- Ports of entry are being improved – with Heathrow Terminal Five opening next year and the new Eurostar terminal this year – and a more proficient approach by immigration staff, and faster tourist visa processing will be provided.
- We must improve customer service skills across a range of sectors which impact on the visitor with the training likely to include disability awareness, English language, foreign languages and cultural awareness. We must also improve the quality of accommodation and facilities. These issues are covered later in this Chapter and the next at greater length.
- We set out key ways in which we will work with the industry to make accommodation and tourist facilities more accessible for travellers with disabilities.

Key actions

- A new Welcome Charter will commit the tourism and hospitality sector to providing good service and linked to this, improved customer service training.
- In accessibility we will improve training and skills; consider a Code of Practice for accessible rooms; work with Tourism for All to develop an internet check list for accessibility in destinations; provide better information about the accessibility of accommodation and attractions and research how to make the National Accessible Scheme more attractive.
- We will host, with Tourism for All, a stakeholder forum for disability organisations and regional partners to promote accessibility and share good practice.

The welcome we offer our visitors will be a crucial measure of the success of the Games... 2012 offers an unparalleled opportunity as a catalyst for accelerating improvements in the quality, services and welcome in Britain.



Getting the welcome right

What visitors experience when they come to Britain, including the efficiency of their transport, their welcome on arrival, the standard of accommodation, the knowledge and professionalism of staff and the information available, will all shape their vision of the country as a whole and influence their holiday choices.

In this, it is important to remember that if people feel welcome on their first visit, whether they are coming from abroad or within the UK, they are more likely to return. The 2012 Games provide us with the opportunity to provide a welcome second to none.

The importance of the welcome that Britain accords to overseas visitors cannot be over stated. What visitors experience at the airport or other point of entry, how easy they find it to travel from there to their final destination, what happens on the way, and how they are treated when they finally leave, are all vital determinants of whether or not they come back.

Getting this right, both now and in the lead up to 2012, when many people will be visiting Britain for the first time, is a key priority. The welcome we offer our visitors will be a crucial measure of the success of the Games and it is widely accepted that 2012 offers an unparalleled opportunity as a catalyst for accelerating improvements in the quality, services and welcome in Britain.

It is not just about sorting out delays at airports or improving transport links or customer service, though these are clearly crucial. A fully coordinated approach is needed, involving relevant Government Departments, airports and airlines, ferry and train companies, and the wide range of organisations whose activities have an impact on the quality of visitors' first impressions of London and other entry points to the UK.

Our record to date

International research suggests that Britain already has a great image, but lags in the welcome we give international visitors. The UK currently occupies top position in the Anholt-GMI Nation Brands Index, but we only ranked 16th out of 38 countries in our "Welcome Score" in the same 2006 survey.

There is clearly scope for improvement. We must start with our airports, ferry ports and international rail stations, where many visitors are unhappy with their first experience of Britain.

Improving the welcome to Britain

A new "Welcome to Britain" group has been set up to change things. The group is chaired by VisitBritain, with representatives from BAA, which runs seven major airports including Heathrow and Gatwick, inbound transport providers, and the Government departments responsible for visa, immigration, transport and other relevant issues. The Group works closely with both the Public Diplomacy Board and the Public Diplomacy Partners Group.

Welcome to Britain aims to deliver a first-class welcome to all visitors to Britain through every stage of their visit by 2012, from first contact to departure; and to ensure that this world-class welcome is recognised by the world in 2012.

The group's focus so far has been on improving the welcome at ports of entry. They will benefit from two major new facilities opening in the coming year – the new Eurostar terminal at St Pancras in London and Heathrow Terminal Five.

Specific initiatives by Welcome to Britain include BAA providing an Olympic-themed welcome at airports after Beijing 2008, and highlighting the language skills of many of their staff. The Borders and Immigration Agency is providing uniforms for its staff to enhance their professional image. UKvisas is improving the visa purchasing process, making it easier to apply online.

The Welcome to Britain Group will develop a Welcome Charter committing the tourism and hospitality sector to the highest standards of service. The group is conscious that some visitors will need reassurance about their personal safety and security in Britain. They will look at balancing security requirements with a warm welcome.

Improving customer service

People and their skills will be crucial to improving the welcome in 2012. Successful implementation of the National Skills Strategies is essential (see Chapter 6).

A recent analysis¹⁶ of the skills needed to improve the visitor experience for the 2012 Games revealed that many of the skills required of those working at the Games are current requirements. Equally, we must keep good staff, including chefs, to ensure a sufficient supply of skilled labour.

People will naturally expect the best standards as the Games approach, and we see higher visitor numbers and a growing media profile. In particular, high levels of customer service skills will be required across a range of sectors – including hospitality, retail and transport.

We will need people who know how to welcome visitors helpfully and professionally. We need people with the right language skills (English and foreign) and awareness of different cultural or disability requirements. A consortium of Sector Skills Councils (led by People1st)¹⁷ is analysing exactly what is required, in a project to be funded by the LDA and the Learning and Skills Council, but with UK wide reach. Their research¹⁸, which will include recommendations for what training is needed to improve customer service, will report its findings in 2008 with the results being promoted through the Welcome to Britain customer service campaign (led by People1st and VisitBritain).



Food preparation, Padstow, Cornwall

More accessible facilities

The Paralympic Games are expected to attract some 4,500 athletes¹⁹ together with their family and friends and a large number will also want to attend other Games events in London and at the other Olympic venues. It is important that they have all the information they need about disabled facilities.

But this is not just about Paralympic athletes. Over 10 million people have a disability in the UK and worldwide, the number of people requesting accessible products and services in the tourism market is growing. Frequently disabled tourists are accompanied by travel companions and in the cases of families with disabled members travelling together, the whole group can only travel when their accessibility needs are met.

It is good for business to cater properly for travellers with disabilities. A European Commission study suggests that revenues associated with the disabled could be in the region of €166 billion²⁰ and that those in America with disabilities were spending US\$13.6 billion annually on travel.

What we've done on accessibility

Since 1993, the National Accessible Scheme has offered hotels and guest houses practical help to make their accommodation more accessible. Since April 2007, any accredited hotelier must have an access statement.

VisitBritain is one of seven partners in a One Stop Shop for Accessible Tourism in Europe (OSSATE) pilot, which aims to provide a multi-platform, multi-lingual digital information service on accessible venues, sites and accommodation.

The Olympic Village and all of the stadia will be fully accessible. All of the public transport facilities serving the Olympic park will be accessible to wheelchair users. And the Docklands Light Railway network, London's black cabs and every London bus will be accessible by 2008.

What we need to do to improve accessibility

There remains a big challenge. The Disability Discrimination Act 1995 requires all service providers to make reasonable steps to deal with physical barriers that make it impossible or unreasonably difficult for a disabled person to use a service. Yet only 2 per cent of accommodation in the UK has been assessed as being fully accessible to wheelchair users²¹ and fewer than 100 of 10,000 new-build hotel rooms in 2004/05 met that standard.²² Just 165 London hotel rooms currently meet that standard (but research is underway to identify additional new provision).

Individual tourism businesses and destinations must strive to meet the needs and expectations of all their visitors, including improving access; providing reliable information about accessible facilities; and showing an understanding of the needs of their visitors.

We recognise the important contribution that Tourism for All has made to accessibility and we will work in partnership with them and People1st to address these problems.

We aim to improve the training and skills of all staff including management, so that they understand the needs of disabled people and can provide them with accurate information, and we will explore the possibility of further research into the effectiveness of disability awareness training in the tourism industry. We will also look at disability training as part of the gold standard customer service work.

We will explore the feasibility of developing a new Code of Practice for room accessibility by a working group including DCMS, Tourism for All, large hotel chains and other organisations representing the interests of disabled people. We will work with Tourism for All to develop an internet tool that will help destinations determine whether their infrastructure is suitable for people with disabilities. Tourism for All will consider how their expertise in conducting destination auditing can be extended to a wider range of trained assessors.

We are also working to improve information, building on the European one stop shop idea and pilot work in Cheshire, Leicestershire and Wales.

We will evaluate research into the benefits and barriers to accessible tourism both within the industry and among consumers. We will then consider how the National Accessible Scheme can be made more attractive to businesses. We will host, with Tourism for All, a Stakeholder Forum for Disability and set up a group of regional partners to promote accessibility and share good practice. We are also working with the Department for Transport to make public transport more accessible, as explained in Chapter 7.



Shropshire

5. Better quality accommodation and attractions

Key points in this chapter

- It is vital that we use the challenge of the Games to improve the quality of our tourist accommodation and tourist facilities. Despite much first-class accommodation, there is still too much that is poor, not least in London.
- We believe voluntary accreditation – by organisations like VisitBritain and the Automobile Association (AA) – is the best way forward. But we need a dramatic increase in the proportion of quality accredited accommodation.
- We plan a new internet portal to make it easier for visitors to provide feedback about their experiences in Britain – this will complement existing customer feedback websites.
- London has a particularly low proportion of accredited accommodation. The London Development Agency has a £1.6 million incentive scheme to increase the proportion of rooms in good accommodation.
- “Quality-assessed only” for Government hotel use is now in place.
- We set out ambitious but realistic targets for quality scheme participation.

An opportunity to improve

The 2012 Games provide an exceptional opportunity greatly to improve the quality of the UK’s accommodation and visitor attractions. Although many UK hotels and guest houses are world-class, too many are poor. And the situation in London is worse than in the country as a whole.

Getting quality right is important to the wider success of the Games, especially as many visitors will be coming to the UK for the first time. Their experiences here should be first rate, and should be good enough to encourage them to return to this country after the Games.

Our quality improvement programme covers London and all other parts of England. And it does not cover accommodation alone.

**The 2012 Games provide
an exceptional opportunity
greatly to improve the quality
of the UK's accommodation
and visitor attractions.**



Why a step-change is required

We have a voluntary system of National Quality Accreditation Schemes – run by the AA and the national tourist boards. But too few hotels and guest houses are accredited as being of good quality. Just 53 per cent of accommodation in the UK is accredited, rising to 56 per cent in Wales and 70 per cent in Scotland but falling to 49 per cent in England²³. The challenge now is to dramatically increase the proportion of accredited accommodation.

The Government believes that voluntary NQASs represent the best way to ensure consistent product improvement. Those we consulted agreed, though some suggested that participation in NQAS should be compulsory (as is being considered by the Welsh Assembly). Others suggested subsidies for participating businesses – either directly from public funds, or through the manipulation of NQAS fee levels to ensure that larger hotels subsidise small players.

However, we believe that the evidence suggests that the existing schemes work well, and the challenge should be to increase voluntary participation. Moreover, cross-subsidies would be unfair to early participants, not least if increased fees at the higher end encouraged some businesses to leave the Schemes. Instead, we believe that a combination of new targets, stronger customer feedback and specific action in London will raise standards. Government will take a lead by only using accredited accommodation for its staff or guests.

Realistic new targets

Our consultation document sought views on proposed targets for NQAS participation. Although most respondents agreed that targets were important, they also wanted more concrete practical support too.

The Government accepts this, and a range of practical measures is set out below. Tracking progress is, however, important to success.

The industry has made it clear that the targets proposed last year were overly ambitious. Following detailed consideration, the Government accepts this, and considers that VisitBritain's long-standing target of increasing NQAS participation to 80 per cent across Britain by 2010 remains the most appropriate aim.

But it is important to track progress beyond that date, in the context of the Games and their legacy. The following targets for establishments participating in the Schemes (rather than, for example, numbers of available rooms) should therefore be regarded as aims which are ambitious and achievable:

NQAS participation	2008	2012	2016
Britain	60%	85%	90%
England	55%	75%	85%

Customer feedback

As is the case in other parts of the economy, the tourism industry's customers are increasingly demanding in what they want from their accommodation. They are also increasingly willing and able to provide feedback on their experiences using the internet.

A number of well-known customer feedback sites (such as TripAdvisor) are now being operated, both by some major hotel suppliers themselves, and by independent operators. More and more people use them before booking, and they provide clear incentives to improve accommodation and facilities.

Following last year's consultation, DCMS and VisitBritain have agreed that the EnglandNet internet portal should provide a facility for electronic feedback. This would not duplicate what the private sector is already providing. Instead, it would be designed to provide reliable, mediated feedback alongside the NQAS arrangements (participation in NQAS is a condition of inclusion on the portal).

Urgent work is now being taken forward on the feasibility of using EnglandNet in this way. The new system should be public-facing, and mediated in a fair fashion. It should be prominently labelled on the EnglandNet system, with a clear identity of its own. It should be clear and easy to use by both customers and accommodation providers. And it should include strong safeguards to ensure that feedback is fair, and that NQAS providers are protected from abusive or malicious use of feedback. Technical and other discussions will fully involve the hospitality industry's representatives and individual businesses.



Hay-on-Wye

Improving London accommodation

London raises particular issues of quality. It will be in the front of the UK shop window in 2012, yet a Visit London survey of the London boroughs in 2006 showed that only 34 per cent of the capital's accommodation providers (having 47 per cent of total rooms) participate in NQAS.

In response, the London Development Agency has announced a £1.6 million incentive and business support scheme to increase the percentage of London accommodation providers in the NQAS schemes to 50 per cent by 2010.

Live Tourism has recently been appointed to operate the scheme. It will:

- Run a series of business seminars, stressing the benefits of NQAS, and providing advice and guidance.
- Visit businesses to make clear that the LDA will subsidise NQAS joining fees charged by VisitBritain or the AA (these range from £120-£643).
- Provide pre-NQAS assessment audit visits to businesses.
- Provide a gateway to wider LDA business advice.
- Link the scheme to the new LDA London complaints service from 2007/08.

The scheme will cover all 33 London Boroughs, but will be particularly aimed at King's Cross, Paddington, and Victoria in the first year; and at Westminster, Camden, Kensington and Chelsea, Hammersmith and Fulham, and Hillingdon in the second.

Providing a lead – Government hotel use

Hotel use by the public sector forms a significant proportion of domestic UK hotel turnover. Many in the industry, including the VisitBritain-sponsored Quality Review Group, have recommended that Government should offer a clear lead by using only "NQAS-assessed only" providers for official travel. The RDAs, the Local Government Association, and VisitBritain have agreed and enacted such an approach, and the then Minister for Tourism wrote to his Ministerial colleagues to that end in 2005.

Hotel use is a procurement matter for individual Government departments, overseen by a Framework Document issued by the Office of Government Commerce (OGC). Under that document, the three suppliers which successfully tendered (Expotel, Carlson Wagonlit, and Hogg Robinson) must offer high quality accommodation to Government customers. Participation in NQAS was not among the specified criteria.

Competition and value-for-money issues, and exceptional operational need by Departments, mean that a compulsory “assessed-only” approach is not possible. However, following detailed negotiation over recent months between DCMS, the OGC, and the three suppliers, each has agreed to:

- Make clear that it is best practice across Government to use NQAS providers.
- Include prominent details of the benefits of using NQAS providers in all electronic and hard copy material sent to Departments.
- Clearly indicate whether hotel and other accommodation providers offered to public sector customers have been inspected under NQAS.

DCMS Ministers will shortly be writing to colleagues across Government to make clear the benefits of this approach to official expenditure, both to the tourism industry and to good administration.



Blackpool

6. Improving skills

Key points in this chapter

- The tourism workforce needs better skills to provide the first-class service we all expect and demand. But we face real shortages: half of managers lack a minimum management qualification; we have too few qualified chefs; most employers believe their staff lack sufficient customer service skills.
- The high level of staff turnover in the industry is an important cause of these problems, as well as being a direct consequence of having insufficiently skilled staff (managers in particular).
- A new and unique on-line resource, the UK Skills Passport, has been developed to provide information and tools on skills development, training, jobs, qualifications and access to funding. This will make it easier for employers to recruit and keep good staff, and help employees take control of their own learning.
- Qualifications are also being reformed to improve training for managers, chefs and those working in customer service roles.

Key actions

- People 1st, industry and partners will finalise the details and responsibilities within the action plans for each of the National Skills Strategies for England, Wales, Scotland and Northern Ireland.
- The public and private sectors will work together to ensure that the Strategies are successfully implemented and success measured at regular intervals.
- The Sector Qualifications Strategy will be developed and funding will be directed to the priority areas.
- We will promote widespread industry take-up of UK Skills Passport with UK Government support.

The skills of people working in the tourism industry are critical to the visitor experience and to ensuring repeat and word of mouth business.



The opportunity to improve skills and retention

The skills of people working in the tourism industry are critical to the visitor experience and to ensuring repeat and word of mouth business. Improving skill levels will benefit individuals, businesses and the economy. However, the industry is facing a serious skill and retention challenge which is holding back its true potential.

This is already being addressed as a priority across the UK through the development of industry-led National Skills Strategies²⁴ for the hospitality, leisure, travel and tourism industries in England, Scotland, Wales and Northern Ireland.

The 2012 Games will showcase the skills of people working in these industries. We must also see the Games as an opportunity to improve the skills retain more staff and develop a better career structure, helping these industries contribute to the UK ambition of becoming a world leader in skills by 2020.

Our skills challenge

Over the last two years, People1st have identified the following problems which have been the focus of Ministerial Summits and employer-led working groups:

- Over half of **managers** do not have minimum levels of management qualification. Demand for managers is set to increase in the run-up to 2012 and they must have the right skills and experience.
- There is a severe shortage of skilled **chefs**. Whilst there has been a 6 per cent increase in demand for chefs, there has been a 10 per cent decrease in supply from colleges. And demand is set to increase in the run-up to 2012.
- According to employers, good **customer skills** are often lacking amongst staff, especially the young. International perceptions suggest²⁵ that we have a poor reputation for customer service. We must improve customer skills of front line staff and managers.
- The industry is suffering **high levels of staff turnover**, which is costing nearly £1 billion each year in recruitment and initial training costs or up to £4,500 for each member of staff lost.²⁶
- The industry needs a **clear communication channel** to remove the confusion around qualifications and how to access funding and support for career development.
- Linked to this is the need for a **reform of qualifications** so that they become more meaningful to employers and employees.

The Leitch Review of Skills

Following Lord Leitch's Review of Skills, the Government committed to a new skills ambition to help the UK become a world leader in skills by 2020.²⁷

Leitch identified what mix of skills would be needed to enable the UK to maximise economic growth, productivity and social inclusion, and considered the policy implications of achieving the level of change required. He concluded that, despite some improvements over the last decade, the UK's skills base does not compare well internationally. He called for a new skills ambition which means doubling attainment at most levels, and in many cases achieving far more.

For the hospitality, leisure, travel and tourism industries, this means equipping people in the core occupations with the appropriate skills at Levels 2 and 3²⁸, and training over 760,000 staff at a cost of £700 million at current rates of turnover. Progress will be monitored regularly through the National Skills Strategies²⁹, feeding into the wider Government review of progress across the economy in 2010.

The National Skills Strategies – our new skills ambition

A great deal of progress has been made over the past two years by People1st and industry in identifying skills priorities, and working with stakeholders on developing long-term solutions. These measures are being outlined in the National Skills Strategies for England, Scotland, Wales and Northern Ireland, which are supported by Government and its agencies across the UK – at a national, regional and local level.

In 2007, DCMS and People1st launched the employer-led *Raising the Bar: the National Skills Strategy for the hospitality, leisure, travel and tourism sector in England*³⁰. Over 5,000 businesses contributed to the development of this Strategy, the culmination of the largest piece of labour market research into the sector for three decades. It was also the result of a series of Ministerial Skills Summits involving key stakeholders and employer-led working groups.

Raising the Bar outlines a Ten Point Plan focusing on management and leadership, chefs and customer service and on improving staff retention. It will also ensure that funding is directed to where it is needed most. As well as employers and providers, stakeholders such as the Learning and Skills Council, Regional Development Agencies, the Local Government Association, Tourism Alliance and VisitBritain have committed their support to meeting the Leitch ambitions in our sector. Government has also committed its full support to the Ten Point Plan. We will also work with trade unions to break down barriers to opportunity and unlock people's potential.

The National Skills Strategies in Scotland, Wales and Northern Ireland are being developed to support their respective national tourism strategies.³¹ Full details on each of these Skills Strategies and specific actions and activities as they are developed can be found at: www.people1st.co.uk

The UK Skills Passport

Across England, Scotland, Wales and Northern Ireland, the main skills focus is the development of UK Skills Passport as a central on-line resource for skills and employment information for hospitality, leisure, travel and tourism.

The UK Skills Passport:

- Identifies the qualifications that count for employees and employers.
- Simplifies access to skills development funding and the best providers – sharing the investment cost between the public and private sector.
- Eliminates the need for repeated delivery of training eg Food Hygiene – saving money and raising esteem.
- Creates a world-class framework for the transferability of skills within the sector.
- Provides the good employers with a pool of talent reducing recruitment costs and shares best practice standards and guidance.
- Illustrates the range of exciting opportunities offered in the sector.

What does the Skills Passport do for employees?

UK Skills Passport provides a straightforward way of maintaining a record of an employee's skills, experience, and qualifications online. This is not only invaluable when applying for a job or promotion but can also help to motivate individuals by encouraging career aspirations, along with further training and development. The career road map feature provides employees with clearly signposted 'development pathways' through the sector along with information on best practice employers, and with the information they need for progression.

What does the Skills Passport do for employers?

UK Skills Passport will make recruiting, retaining, and developing staff much easier. It allows employers to invest in the future of their staff and recognise achievement, helping to improve retention. The information on industry-recommended courses will help to identify the best qualifications to look for in prospective employees. It also provides employers with the ability to quickly identify all the skills and experience of their current employees.

Summary of benefits for employers

- A verified record of the skills, experience and qualifications of members of staff and job applicants.
- Clear and concise information about the UK qualifications system.
- Information on how to access Government funding.
- A database of industry approved courses and qualifications.
- Information on the learning providers (colleges, universities and private providers) who deliver these courses and qualifications.
- Best practice standards for workforce development.
- A tool to devise development plans for employees.
- A tool to create job descriptions and adverts.
- A vacancy posting service for businesses.

Summary of benefits for employees

- A verified record of skills, experience and qualifications.
- A database of the courses and qualifications that will equip employees with the skills needed by industry.
- Identification of industry respected learning providers.
- Information on the National Hospitality Skills Academy.
- Information on possible costs of courses and qualifications.
- A list of best practice employers in the sector.
- A tool to devise a personal development plan.
- Information on development pathways and how to progress within the sector.
- A service allowing employees to match their skills with job vacancies.

Further details can be found at:

www.ukskillspassport.co.uk

Qualifications reform

As part of a wider programme of sector vocational qualifications reform, People1st are working with the industry, awarding bodies, providers, funding bodies and other partners, to map the current and future qualification needs of the sector. They will report in 2009 with a Sector Qualifications Strategy which will prioritise management and leadership, chefs, and ensure priority qualifications are appropriately funded.

Links and further information

DCMS skills pages www.culture.gov.uk

People1st www.people1st.co.uk



Castle Combe, Wiltshire

7. A sustainable approach

Key points in this chapter

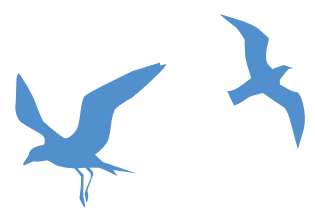
- We are determined to ensure that as we develop the quality of our tourism, we do so in ways that are sustainable.
- Within a new national framework, we will develop a sustainable industry with year-round potential.
- We must reduce energy and water consumption, encourage recycling and the reuse of materials.
- We will help businesses to overcome these challenges, while validating those who take positive action on the environment, and help visitors make an informed choice.
- We will help more firms to become sustainable, and support successful awards schemes that recognise best practice in this area. We will market sustainable UK tourism and work with the Department for Transport to promote “greener” transport options.
- We will work closely with other departments and agencies, to improve sustainability nationally, locally, regionally and internationally.

Key actions

- We will develop a new national framework and indicators for a sustainable approach to tourism in England and a sustainable marketing strategy for the UK.
- We will continue to support international programmes in support of a global, sustainable approach to tourism and to work with other Government departments and agencies.
- We will explore the feasibility of improving the relationship between the National Quality Assurance Scheme (NQAS) and Visitor Attraction Quality Assurance Scheme (VAQAS) and sustainability, creating an entry level scheme and validation of sustainable tourism schemes.

On sustainable transport:

- We will continue to work with the Department for Transport (DFT) and other stakeholders across Whitehall across a wide range of transport modes that effect tourism.
- We will consider how we might work more closely with DFT on accessible transport issues for visitors with disabilities.
- We will work with the Highways Agency on their *Influencing Travel Behaviour* project which aims to reduce congestion on major trunk roads.



With increasing public concern about climate change and the impact of tourism on the environment, we must do all we can to improve the sustainability of the industry.



Why we must ensure tourism is sustainable

The 2012 Games offer us a real opportunity to ensure that there is a sustainable approach to tourism. With increasing public concern about climate change and the impact of tourism on the environment, we must do all we can to improve the sustainability of the industry.

That means effectively managing the interaction between the needs of Visitors, Industry, Community and the Environment – the ‘VICE principle’ – and ensuring that it is embedded in policy formulation.

Respondents to our consultation were clear that sustainability must be fully integrated into tourism policies and practices, and should not be seen as a separate type of tourism or “bolted on”.

A new national framework for sustainable tourism

Respondents believed that the delivery mechanisms for ensuring a sustainable approach to tourism had changed since *A Time for Action*, published by the English Tourism Council in 2001³². Regional plans and operational practice have developed, but a national policy statement or revised framework could ensure consistency. We believe that there are six key challenges to ensure tourism in England is sustainable, and that they should form the basis of a new national framework based around the VICE model these are:

Visitor

- **Ensuring quality and making holidays accessible for all**
 - quality of facilities and services, reliable information, safety and security and providing facilities that all can enjoy, including those with disabilities.

Industry

- **Reducing the seasonality of demand** – concentration of tourism trips into certain times of the year can reduce the viability of enterprises and their ability to offer year-round employment and place pressure on communities and natural resources and leave surplus capacity at other times.
- **Improve the quality of tourism jobs** – how the sector is perceived as a career choice revolves around the quality of jobs, salary levels, the pattern, length and consistency of working hours (while recognising that these match the pattern of customer demand), the ability to offer full-time, year-round jobs and long-term contracts, and career opportunities.

Community

– **Maintaining and enhancing community prosperity and quality of life** – tourism has the power to change the character and prosperity of the places where it occurs. The challenge is to manage change in the interests of the well-being of the community. This might include supporting local businesses, local employment and encouraging local residents' use of tourist facilities.

Environment

- **Minimise resource use** – tourism has the potential to use a large amount of environmental resources. Minimising energy consumption, reusing and recycling of materials, improving water and air quality, reducing water consumption and reducing and managing litter can all reduce tourism's footprint. Tourism businesses can also give back something to the environment in recognition of its impact, for example by supporting biodiversity or habitat conservation schemes.
- **Address the impact of tourism transport** – the impact of climate change makes this a high profile issue for tourism planning. It also impacts on the economic viability of the industry and the quality of life for local communities.

DCMS will seek stakeholders' views about the appropriateness of these challenges and how progress on them should be measured, before publishing and disseminating them more widely.

A three-part strategy for sustainable tourism

A National Steering Group comprising DCMS, VisitBritain, South West Tourism, New Forest District Council and Tourism South East was set up in 2004 to look at ways to encourage better sustainable practices in tourism businesses. It recommended a three-part model:

1. Improve the relationship between the National Quality Assurance Scheme (NQAS) and Visitor Attraction Quality Assurance Scheme (VAQAS) and sustainability.
2. Promote a range of tools for supporting businesses in taking action and to develop a toolkit to help destination managers take this work forward.
3. Develop a nationally consistent accreditation scheme that recognises businesses taking action to care for the local area and environment and allows visitors to make a more informed choice.

In taking forward this model VisitBritain is exploring:

1. **Integration** – Accepting the steering group recommendation to improve the relationship between the national quality assurance schemes to provide information to industry on sustainable practices and where these can be implemented to improve quality at minimal cost.
2. **Establishing an entry level** – Increasing participation within the tourism industry so that most businesses are doing something without demeaning the work of those who have taken significant steps. This should result in the provision of simple “green” credentials which consumers could recognise.
3. **Validation of sustainable tourism schemes** – Recognising well established schemes (such as the Green Tourism Business Scheme, the David Bellamy Conservation Awards for holiday parks and the Green Dragon Scheme for Wales) through robust and rigorous validation.

The work will be informed by findings from qualitative research into consumer attitudes to sustainable tourism. Through its Sustainable Tourism Strategy, VisitBritain will also support the positioning of Britain as a premier sustainable destination, promote the take up of best practice and encourage tourists to enjoy products offered by sustainable tourism businesses. The authority will also launch a new “Insights” resource for the tourism industry which will contain an updated and revised version of the *Destination Managers Handbook*, showing good practice to help managers provide sustainable tourism locally.

Sustainability in London

The Mayor of London’s global role in tackling climate change, is helping position London as “the sustainable world city”. Through the ‘C40’ initiative, London is working with other world cities to progress the sustainability agenda.

Visit London and the LDA are supporting the Mayor’s Climate Change Action Plan, through innovative campaigns that inspire more sustainable ways of living and working in London. London has a ten-point framework that it will use in working with the industry to reduce London’s carbon footprint:

1. Encouraging environmentally friendly behaviour by visitors.
2. Promoting public transport, cycling and walking.
3. Promoting good practice amongst tourism businesses through partner work, awards and a green tourism business scheme.
4. Publicising free advice on sustainable purchasing, resource conservation and business management.
5. Promoting and marketing London sustainably – working with key partners, train operators and Eurostar.
6. Tackling emissions from aviation – promoting best practice by airlines and others and supporting the Emissions trading scheme.
7. Encouraging visitors to the capital to offset their own travel.
8. Encouraging Londoners to enjoy their own city – as an alternative to travelling abroad.
9. Promoting awareness of London’s green spaces and other outdoor attractions.
10. Commissioning research to identify opportunities to reduce CO₂ emissions for London’s visitor economy.

Sustainable tourism in the regions

RDAs, local authorities and destination managers have a vital part to play in ensuring that sustainable tourism principles are embedded into their tourism strategies, and in assessing their effectiveness. Much work has taken place through Regional Sustainable Tourism Strategies, and there are many local sustainability action plans and targets. Some regions are also encouraging their businesses to participate in nationally recognised quality accreditation schemes such as the Green Tourism Business Scheme.

In 2004, six councils were awarded beacon status – a scheme to reward excellence in local Government – for successfully balancing the benefits of a growing tourist industry with the needs of the local community and the environment. These were Birmingham City Council, The Broads Authority, London Borough of Greenwich, New Forest District Council, South Hams District Council and Tynedale District Council. They provide good examples of how to harness investment in the most positive way so that the needs of visitors, residents, businesses and the environment are met.



Cambridgeshire

The wider challenge: working in Europe and the UN

DCMS is a member of the European Commission's Tourism Sustainability Group (TSG) which is helping to develop more sustainable European Tourism. The TSG includes experts representing industry associations, trade unions, civil society, destinations, member states administrations and international organisations. Their work is reflected in the report, *Action for a more sustainable European tourism*.

The TSG report aims to stimulate action to make European tourism more sustainable by identifying:

- Why tourism is so important in the pursuit of sustainable development and what our aims should be in making European tourism more sustainable.
- Key challenges that European tourism faces in meeting these aims.
- Recommended processes for working together to address those challenges.
- A framework for action at different levels and by various stakeholder groups.
- A set of specific initiatives to be taken at the European level.

The report was published in February 2007 followed by a period of consultation. The Commission will set out its conclusions in a Communication due towards the end of 2007. We will continue to support the TSG's work.

We are also supporting United Nations World Tourism Organisation activity on tourism and climate change. We will be jointly holding a global ministerial meeting at the World Travel Market in London in November 2007, which will discuss the issues and potential solutions facing tourism and the environment.

Sustainable transport

Tourism depends on good transport links. Responses to our consultation highlighted the need for a safe, efficient, affordable, accessible and fully integrated transport network, both in London and throughout the country.

London's extensive transport network will be further enhanced before 2012, with the new fifth terminal at Heathrow Airport from 2008 and the high speed Channel Tunnel Link, which will open at the end of 2007 with a new international terminus at St Pancras. The Mayor of London is taking forward a five year, £10 billion investment programme which will improve rail, tube and the Docklands Light Railway.

LOCOG and the Olympic Delivery Authority (ODA) are working with transport providers to deliver a "public transport Games" where visitors are actively encouraged to use public transport.³³ As we have seen, transport will be more accessible too.

DCMS can act as a catalyst to promote "greener" visitor transport as part of our sustainable tourism policy. We will liaise with other Government departments and transport agencies so that the interests of tourists and tourism businesses are taken fully into account when developing new transport proposals.

We also have a direct role in promoting environmentally friendly policies through marketing and information provision directly with our stakeholders in the tourism industry. We will continue to look for opportunities to develop this approach.

Links and further information

DCMS sustainable tourism pages
www.culture.gov.uk

The Green Tourism Business Scheme
www.green-business.co.uk

The David Bellamy Scheme
www.davidbellamyconservation.org.uk

London 2012 Olympic Games and Paralympic Games
transport strategy
www.london2012.com/en/ourvision/ODA/

The Greater London Authority/London Development
Agency transport strategy
[www.london.gov.uk/mayor/strategies/
transport/trans_strat.jsp](http://www.london.gov.uk/mayor/strategies/transport/trans_strat.jsp)

Transport for London transport strategy
www.tfl.gov.uk



Dentdale, Cumbria

8. Monitoring progress and tracking implementation

Key points in this chapter

- We must measure how well we do. We will work towards new tourism growth targets, and monitor progress towards those targets. The first target will be set by April 2008.
- For the target to be meaningful, our data must be more reliable. We can improve the quality of data on leisure day visits within the UK and improve our data on spending by international passengers.
- We can do more to analyse where growth is occurring – comparing the domestic and international markets – and assess customer satisfaction better. All our data must be readily accessible and easily understood.
- We must also develop indicators that show the extent to which we are successful in improving the quality of what tourists experience.
- Progress towards the timetable and targets set out in this paper will be monitored by a national group of senior representatives of the tourism industry, reporting directly to the Minister for Tourism.

Key actions

- We will set a new tourism growth target by April 2008.
- We will look at how to address issues of data improvements, domestic/inbound targets; consumer satisfaction and data availability.
- We will agree performance indicators related to the tourism experience.
- Working as part of the Partners for England initiative we will engage in efforts to develop an English Tourism Intelligence Partnership.
- Working with VisitBritain we will agree new “Spreading the Benefits” targets for 2008-2011 and 2012-2015.
- VisitBritain, the London Development Agency, Visit London and DCMS will undertake an analysis of the tourism benefits of the Games and publish an assessment by September 2007.
- Systems to be set up to monitor progress through a high level implementation group, a number of sub sector specific groups, and existing networks of public and private sector relationships

An opportunity to improve what we know

It is important that we are able to measure the tourism benefits from hosting the Games. So we will work with our partners to develop a valid and reliable evidence base to measure current levels of economic activity, and then set targets to help assess progress to 2012 and beyond.

We already have a target with VisitBritain, the Tourism Alliance, the RDAs and the local Government sector to see a UK tourism sector worth £100 billion a year by 2010. Starting from a base of £74.2 billion in 2003, the sector is already worth over £85 billion a year. As Table 1 shows, growth in the tourism sector is faster than that of the general economy. So, while our target now looks achievable, there is a case for being even more ambitious in the years ahead, given the expected impact of the Games.

We will set a tourism sector growth target which provides a realistic and understandable assessment of the performance of the tourism sector in the run-up to and after the Games.



Table 1. Annual and average percentage productivity changes from 1998 onwards³⁴

	1999	2000	2001	2002	2003	2004	2005	Average 1998-2005
Tourism and other leisure	3.0%	4.1%	3.2%	3.3%	-0.1%	1.6%	4.7%	3.3%
Whole economy	1.6%	2.9%	1.5%	1.0%	1.8%	2.5%	1.1%	2.1%

The challenge of setting the right target

Setting and adopting a valid and achievable target – and being able to assess progress on such a target – requires a valid and reliable tourism evidence base. To achieve this, a number of issues would need to be overcome, including:

- Defining “tourism” data.
- Identifying regular and comparable data sources.
- Co-ordination and communication of data between national, regional and local bodies.
- Resolving current measurement difficulties.
- Increasing capacity to collect, analyse and produce tourism data.

What is already happening?

Tourism satellite accounts are being compiled in a number of countries as a way of measuring the economic importance of tourism, which is not revealed by the existing statistics on tourism spending or by data on tourism related industries. DCMS published a report on Tourism Satellite Accounting in 2004/05.

VisitBritain has worked with national tourism organisations to improve the methodology and outcomes of the annual UK Tourism Survey. DCMS is also working with other European countries to revise the EU Tourism Statistics Directive.

Partners for England have put forward proposals in response to the Allnut review of tourism statistics, to set up an English national tourism intelligence unit.

Setting a new tourism growth target

We will set a tourism sector growth target which provides a realistic and understandable assessment of the performance of the tourism sector in the run-up to and after the Games.

Most consultation respondents believed that any new strategic growth target should be the industry's percentage rate of growth. Suggestions about such a target vary between a 1 per cent and a 4.5 per cent increase annually. However, there are also concerns about the ability to confidently predict more than a year ahead, as there are many variables that can impact on this.

So, working with our partners and the Devolved Administrations we will agree a new tourism growth target by April 2008, with meaningful indicators to measure progress. Tourism Satellite Accounting methodology will be used to develop and assess progress towards the new target, drawing on the International Passenger Survey, the UK Tourism Survey and the Leisure Day Visits Survey.

Timing of the target

The headline target will be set for the period from 2008 to 2011. This allows for work during 2007 and early 2008 to be carried out in order to develop the target. This period also reflects the first Government funding period over which this Strategy will run. Further work will be undertaken in 2011 to set a 2012-2015 target, taking account of the need to measure the benefits following the Games.

Developing the target

In developing the new headline target we will also address the following issues:

Improving the data – Although there have been improvements in key data sources since we looked at Tourism Satellite Accounting in 2004, two key areas for national data improvement remain. England Leisure Day Visits – now the largest part of UK tourism economy – need regular and consistent measurement and to include UK wide data – and we must increase the amount of expenditure data collected in the International Passenger Survey.

Domestic tourism – It is important that we are able to differentiate between inbound and domestic growth. An analysis of inbound and domestic tourist flows will help to assess whether targeted activity to stimulate growth is effective. We will look at the possibility of setting targets relating to the growth of the UK market share of inbound tourists compared to traditional competitors, and the volume of domestic trips against the volume of outbound trips.

Consumer satisfaction – It is important that we get better at assessing consumer satisfaction levels. We could look at how satisfied visitors are with the UK tourism experience and benchmark this against leading competitors.

Making data available – to ensure that the contribution of the tourism sector is visible, data must be easily accessible.

Performance indicators

The growth target will be underpinned by a series of performance indicators that help to assess the quality of the English tourism experience. Performance indicators are based on the areas of the sector identified by the industry and Government, where it is agreed additional support is required to secure improvements. These include:

Skills – improve skills levels and retention rates in line with National Skills Strategy targets.

Quality – increase hotels signed up to the National Quality Assurance Scheme.

Accessibility – increase the supply of accessible accommodation.

We will agree performance indicators that indicate quality improvements in the tourism experience.

Regional data and targets

Tomorrow's Tourism Today highlighted the need for improved data, particularly better domestic data. Because nationally collected data is geared toward meeting national legislative and policy making needs, it does not always meet the needs of regional, sub-regional or local users. Regional and local agencies use a range of data collection models, such as the Scarborough Tourism Economic Activity Monitor (STEAM) and the Cambridge model. However, the lack of consistency between models and data collection makes comparison difficult. As a result, the members of Partners for England are establishing an English Tourism Intelligence Partnership, which could be a valuable resource for regional tourism data. We support this development.

Tracking implementation

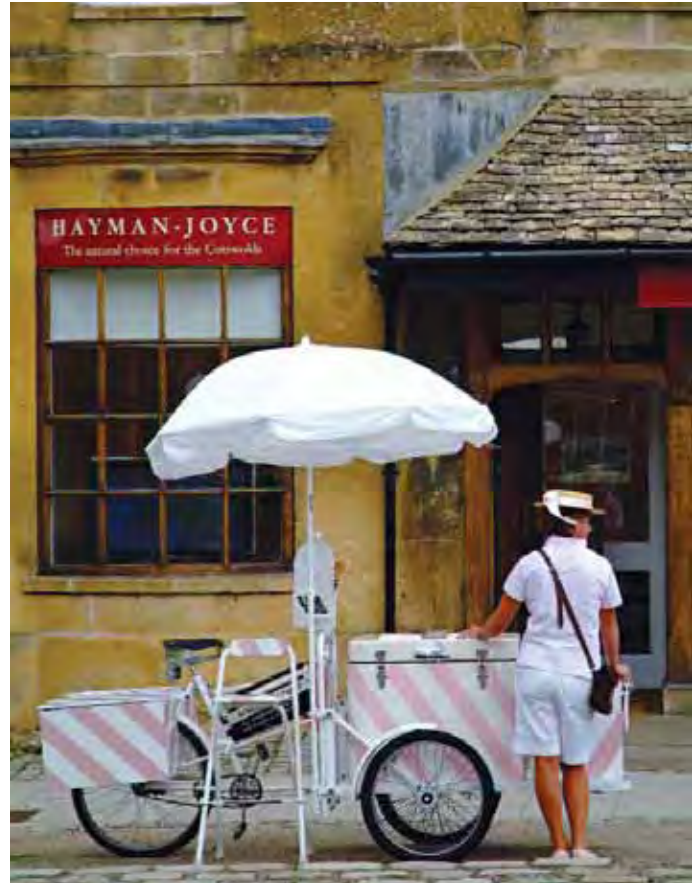
We now examine how progress will be tracked over the five phases of this Strategy. It is too early to map out precise details of all of the arrangements which will track implementation. These must have the necessary operational flexibility to cope with changing circumstances in the five years up to the start of the Games. However, we set out the main parameters here.

Tracking implementation at national level

Although most who responded to our consultation felt that the present structures of public sector support for tourism were generally adequate, many felt that the 2012 Games will present a new challenge, and that new arrangements are needed to track the implementation of the national Strategy. We agree.

So, nationally, the industry's progress from 2008-12 will be monitored and guided by a high-level Implementation Group. Made up of senior representatives of the tourism private and public sectors, and reporting directly to the Minister for Tourism, its membership will be based on that of the present Ministerial Advisory Group³⁵. It will meet for the first time in the autumn of 2007, and will be responsible for shaping the progress reports which will be issued at the end of each of the five phases of the Strategy.

Whilst we do not believe that a joint VisitBritain/Visit London unit – one idea to emerge from the consultation – is necessary, VisitBritain and Visit London will formalise their relationships, roles and responsibilities in a Memorandum of Understanding covering the activities relating to the 2012 Games.



Broadway, Worcestershire

Industry engagement

Alongside the high-level Implementation Group, a number of sub-sector-specific groups will shortly be established. These will include senior industry figures from the hotels industry, the attractions sector, the wider hospitality industry including pubs and other sub-sectors of the tourism industry. These groups will draw on leading practitioners in marketing and other key areas in agreeing, producing, and publishing sub-sectoral implementation plans by the end of 2007.

Public sector support work

Effective tracking of the success of the UK public sector in supporting the industry, through its investment of over £300 million a year, is also vital.

DCMS will make full use of its existing networks of public and private sector relationships in tracking implementation through:

- Ministerial meetings with industry Chief Executives and Chairs, and full use of the direct relationships between the Department and leading tourism companies.
- Regular programmes of high-level meetings between DCMS and trade bodies including (but not limited to) the Tourism Alliance; the British Hospitality Association Business In Sport and Leisure; UKinbound; the British Holiday and Home Parks Association; the Association of Leading Visitor Attractions; the British Association of Leisure Parks, Piers and Attractions; the Business Tourism Partnership; and the British Beer and Pub Association.

- Regular quarterly discussions with the Regional Development Agencies' Tourism Leads Group, designed to fully co-ordinate work under this Strategy, and under the RDAs' own 2012 and other Strategies.

- Full and regular engagement with local authorities, through close dialogue with the Local Government Association and Tourism Together.

VisitBritain will broaden its excellent high-level contacts with businesses across the UK, building on existing partnership arrangements. Visit London will use its existing – and comprehensive – network of partner businesses across the capital.

Programme work

As well as the national and regional arrangements set out above:

- In marketing, the process of engaging all of the UK's tourism businesses in the national campaign, beginning at the Beijing handover, will be tracked by a new, VisitBritain-led Marketing Consultation Group. It is also likely that the current VisitBritain UK Destination Brand Review, and the Visit London Brand Vision Review, will lead to additional arrangements for tracking marketing progress later in 2007.
- In tracking the progress of tourism marketing and promotional work around the Cultural Olympiad, the RDAs will work closely with LOCOG in measuring the extent to which the industry is engaged at regional and local levels. This work will draw on the input of the new network of Creative Programmers.

- In quality, DCMS and VisitBritain will shortly put in place new arrangements to guide and monitor the industry’s progress against national objectives, to replace the Quality Review Group (now that the Review Group’s core work is at an end). These arrangements will fully reflect the importance of the visitor attractions sector to the success of the wider quality agenda.
- Work to improve visitor welcome will be 2012 co-ordinated and monitored by the Welcome to Britain Group (through which VisitBritain will work with DCMS, other relevant Government Departments, the airports and airlines, and other commercial partners to ensure that the best possible welcome is extended to 2012-motivated and related visitors).
- In skills, DCMS and People 1st will hold a Monitoring and Implementation Group to oversee the direction of the strategy in England, measure success against agreed industry targets, communicate successes and identify and address any barriers to progress. This group will include representatives from the public and private sector and will be chaired by the Tourism Minister. Separate arrangements will be put in place for the other UK nations.
- In sustainability, DCMS and VisitBritain will put new arrangements in place to track progress against the key priorities for sustainability set out in this Strategy.



Ballintoy, Northern Ireland

Appendix A: Key actions

The top three priorities taken from each section of the Strategy are shown below. These and other important priorities are described in more detail in the specific chapters.

Phase 1 2007-08 Preparing the Ground

Marketing and branding

Building relationships with stakeholders and potential partners.

Integrating the impact of the London 2012 Olympic and Paralympic Games into long-term tourism planning.

Agreeing all the respective brand values guidelines.

Spreading the benefits

DCMS, VisitBritain, the Nations and Regions and other partners will work together to:

- a. Help advance strategies and objectives.
- b. Avoid displacement within the domestic market.
- c. Transmit the message that the regions are "open for business" during the Games period.
- d. Ensure complementary marketing of the regions.
- e. Take advantage of the Cultural Olympiad as opportunities arise (all continue over all phases).

The Cultural Olympiad

VisitBritain, Visit London, the RDAs and other partners to work through the Culture and Creativity Advisory forum (continues Phases 2-4).

Network of regional Creative Programmers to consider local tourism initiatives and events (continues Phases 2-4).

The welcome

Significantly improve and deliver a first-class welcome to all visitors to Britain through every stage of their visit from first contact to departure and publish a Welcome Charter (continues to Phase 3).

Accessibility

Improve workforce skills in dealing with the needs of people with disabilities through training (continues through all of the Phases).

Explore the feasibility of preparing a Code of Practice for accessible and available rooms.

Develop a web based tool to help destination audits and increase number of auditors (continues through Phase 2).

Quality

Use of "assessed only" accommodation for Government business purposes.

Introduce a new customer feedback system (continues over Phase 2).

Skills

People 1st, industry and partners will finalise the details and responsibilities within the action plans for each of the National Skills Strategies for England, Wales, Scotland and Northern Ireland.

The public and private sectors will work together to ensure that the strategies are successfully implemented and success measured at regular intervals.

Develop the Sector Qualifications Strategy and ensure funding is directed to the priority areas.

Promote widespread industry take-up of UK Skills Passport with UK Government support.

Sustainability

Develop a national framework and indicators (continues into Phase 2).

Develop a sustainable marketing strategy (continues over all Phases).

Continue to support international programmes in support of a sustainable approach to tourism (continues over all Phases).

Explore feasibility of improving the relationship between the National Quality Assurance Scheme (NQAS) and Visitor Attraction Quality Assurance Scheme (VAQAS) and sustainability, creating an entry level scheme and a procedure for the validation of sustainable tourism schemes (continues to Phase 3).

Launch an updated and revised version of the *Destination Managers Handbook*.

Transport issues

Continue to work with stakeholders and other Government departments on transport modes that effect tourism (continues over all Phases).

Data and evidence

Agree a new tourism growth target by April 2008.

Look how to address issues of data improvements.

Agree performance indicators that indicate quality improvement in the tourism experience.



Phase 2

2008-11 – Taking the Baton; Building Momentum; Galvanising Britain; Inviting the World

Marketing and branding

2008

Support the Beijing handover with tourism-specific activities.

Launch and promote the Cultural Olympiad/Liverpool '08 to international and domestic markets.

Establish relationships with the main broadcasters.

2009

Build awareness for the Games, and establish relationships with official Games tour operators in all key markets.

Showcase Britain to international event and incentive planners.

Finalise international and domestic marketing strategies up to 2012.

2010

Develop a UK-wide campaign, incentivising businesses to "roll out the red carpet".

Recruit businesses into quality improvement programmes linked to the London 2012 Olympic and Paralympic Games.

Roll out international Games marketing/promotional activities, linking to domestic health/activity campaigns.

2011

Provide all ticket applicants with tourism information relating to the whole of Britain (including how to be part of 2012 outside of London).

Reinforce "don't stay away/don't go away" messages; running "test" media events.

Refine post-Games marketing strategies and marketing opportunities.

Business tourism

Win business by segmenting, targeting, winning and reporting more business visits and events through the provision of a range of support mechanisms.

Using the platform of winning international association events as a basis for segmenting and winning more sporting and cultural events (all continue over all Phases).

Tracking implementation

Develop tracking mechanisms to monitor progress of the programme of work set out in the strategy (continues over remaining Phases and beyond).

Phase 3 2012 Welcoming the World

Marketing and branding

Provide a first-class welcome, and comprehensive information for all Games visitors (all continue to Phase 4).

Support UK businesses in their delivery of positive visitor experiences.

Provide Britain-wide content to unaccredited media.

Phase 4 2012 The Games Itself and Defying the London Displacement Effect

Actions for this Phase continues from previous Phases as noted in the text.

Phase 5 2013> Cementing the Legacy

Marketing and branding

Maximise post-Games success stories in international and domestic PR.

Exploit positive Games legacy outcomes for tourism.

Encourage the industry to build on the gains made in relation to the London 2012 Olympic and Paralympic Games.



Southwold, Suffolk

Appendix B: Investment

The Government's central economic objective is to raise the rate of sustainable growth and achieve rising prosperity and a better quality of life, with job opportunities for all. An essential element of that objective is to improve the economic performance of every part of the UK. Unfulfilled economic potential in every nation, region and locality must be realised to increase the UK's long-term growth rate.

Underlying this objective, the Government is committed to raising the rate of UK productivity growth over the economic cycle, improving competitiveness and narrowing the gap with our major industrial competitors.

The Government aims to do this through a framework of five key drivers of productivity: competition, innovation, skills, enterprise and investment. This appendix concentrates on the important role of investment to the tourism industry.

Investment in tourism

The current tourism situation shows a strong recovery from 2003. Visitor numbers and spend are increasing with a dynamic private sector performance. The economic background for private sector investment in tourism is good. In the last three months of 2006, the UK economy expanded at its fastest rate in more than two years (0.8 per cent in the fourth quarter). The UK hospitality industry is doing even better; in the same period it expanded by 1.8 per cent, more than double that of the British economy as a whole.

The UK is a prime target for inward investment; in 2005, the UK was the world's most popular foreign direct investment (FDI) destination³⁶, coming in second place for 2006 to the US³⁷. The tourism industry has a good share of this and hotels in particular are investing heavily. In London, for example, around 3,000 new hotel rooms are being built each year, with a net gain of 2,500 rooms per year³⁸. Travelodge is investing in 4,000 new rooms a year, and plans to have 7,000 budget rooms available in central London in time for the 2012 Olympic Games and

Paralympic Games³⁹. Budget hotels in particular are expanding fast, with 10 per cent growth per year predicted in this and the coming decade⁴⁰.

Government's role in ensuring that the tourism investment picture is a healthy one in the run up to the London 2012 Olympic and Paralympic Games in London is twofold. It requires effective public sector investment and maintenance of the macroeconomic environment conducive to private sector investment.

Public investment

Long-term tourism will benefit from the significant levels of investment in stadia and transport infrastructure around the Olympic Park and other Games locations.⁴¹

The Government has set aside £9.3 billion in funding and contingencies to cover the cost of building the Olympic and Paralympic infrastructure. The Olympic Delivery Authority (ODA) will be given a budget to cover the construction costs as a whole of up to £5.3 billion. This comprises £3.1 billion for building the Olympic park and venues – the core Olympic costs – £1.7 billion for Olympic infrastructure and regeneration, and a £0.5 billion allowance for programme contingency.

Currently, across the UK, tourism receives over **£300 million a year** in public funding. Sources of funding include:

- A grant of £50 million from DCMS to VisitBritain (of which approximately £35 million is for international marketing of the whole of the UK, and the balance for domestic tourism work).
- A grant of £22 million from the devolved Welsh Assembly Government.
- £90 million direct and indirect public sector investment in tourism in Scotland from the Scottish Executive.
- An estimated total of around £50 million from the nine Regional Development Agencies (responsible for tourism in the English Regions).
- Local authorities' spend of about £126 million (funded by a combination of local taxes and central funding).

Measuring the benefits of investment

Over the last three years, under the Tourism Reform Programme, DCMS has both changed and supported tourism. This reform, coupled with ongoing investment, means that we now have:

- VisitBritain, a world-class marketing body created in April 2003 which has generated positive PR for Britain worth over £600 million, created a comprehensive national website (www.visitbritain.com), developed a global consumer database of over seven million entries, and launched EnglandNet.
- Visit London, the LDA and the Mayor of London's ten-year vision and strategy.
- The nine English RDAs with responsibility for tourism at regional level, have collectively invested about £50 million and have each developed a regional tourism strategy alongside their wider Regional Economic Strategy.
- Local authorities supporting around 500 Tourist Information Centres promoting their local areas. A number of authorities have achieved beacon status for their promotion of sustainable tourism.⁴²
- The harmonisation of Quality Assurance Schemes for accommodation in England, Scotland and Wales ensuring that domestic and international consumers now have access to trustworthy standards throughout Britain.
- Successful leadership of the tourism industry from the DCMS and VisitBritain after the 7 July 2005 London bombing. The Tourism Industry Emergency Response Group was responsible for co-ordinating information and recovery work.
- A more tourism-friendly planning framework, following work by the DCMS in partnership with the industry which resulted in the publication of the *Good Practice Guide on Planning for Tourism* in 2006.

- The launch of the industry-led **National Skills Strategy** for the hospitality, leisure, travel and tourism sector in England in March 2007, following DCMS/People1st Skills Summits over 2005-07. The Strategy's Ten Point Plan sets out plans for significant workforce skills improvements in management, chef skills, and customer service, and for improved retention rates.
- Over 100 Tourist Information Centres in the VisitScotland network.

The regulatory framework

The UK has one of the most investment friendly climates, not only in Europe but also globally. However, there remain particular concerns for the tourism sector, with regard to the regulatory regime, especially the Land Use Planning framework.

Land use planning

Planning regulations have long been considered by industry to be a major barrier to investment and expansion in tourism. To address these barriers, in May 2006 the Department for Communities and Local Government (DCLG) and DCMS jointly launched the *Good Practice Guide on Planning for Tourism*.⁴³ The Guide was the result of close and effective working between the private and public sectors, including in-depth consultation with the tourism industry. It delivers a new framework which seeks to ensure tourism's economic, environmental and social contribution and its capacity for rural and urban regeneration are taken into account in planning decisions, thereby removing obstacles to the development and adaptation of the tourism product. Importantly, planning authorities are required to have regard to the Guide in formulating their local and regional planning frameworks and the advice it contains may also be a "material consideration" in individual planning decisions.

The importance of a land use planning framework that facilitates economic benefits has also been raised by Kate Barker in her recently published *Review of Land Use Planning*.⁴⁴ Her report highlights the vital role planning needs to play to deliver sustainable economic development given the pressures of a growing population, rising incomes, changing demographics, climate change and rapid changes in the global economy. The review recognises the high costs placed on developers, businesses and communities when the planning system is unnecessarily slow, unpredictable, expensive and bureaucratic. The report recommends streamlining of planning policies and processes to improve speed, transparency and efficiency.

The Government welcomed Kate Barker's report and agreed with her analysis. In response to her recommendations, the planning white paper *Planning for a Sustainable Future* was published in May 2007. The aim of the white paper is to improve the speed, responsiveness and efficiency of the planning system.

DCMS, together with regional partners and sector stakeholders, has engaged in dissemination initiatives to ensure that the content of the Guide is taken into consideration by both planners and industry alike. We will continue to work with other Government departments and key stakeholders to promote its aims and principles.

Better regulation

The Better Regulation Executive has been tasked by the Prime Minister with cutting red tape so that businesses can be more productive and public services more efficient, by legislating only where necessary and deregulating and simplifying existing legislation wherever possible.

The Legislative and Regulatory Reform Act (2006) aims to make it quicker and easier to tackle unnecessary or over-complicated regulation and help bring about a risk-based approach to regulation. The Act is an important part of the Modernising Government agenda, fitting into a wider programme of action aimed at addressing the problem of burdensome regulation.

DCMS has made specific commitments to addressing the regulatory environment for the Tourism sector in its recent *Lifting the Burden* publication.⁴⁵ The plan recognises that the regulations with which the tourism industry is most frequently frustrated are those usually owned by other Departments, for example: taxation (HM Revenue and Customs); planning (Department for Communities and Local Government); visas (Home Office), as well as regulations originating from the EU. Whilst recognising that there are good regulatory reasons for these policies, there may be scope for some rationalisation and, as such, DCMS has a key role in representing the sector's interests to other Departments, the EU and regulators.

Appendix C: Impact assessments

Impact Assessments (IAs) are designed to help policy-makers understand the consequences of proposed new policy. They set out and provide the opportunity for stakeholders to challenge why the proposed intervention is necessary, how policies are expected to impact on different groups, proposed benefits and the estimated costs. A Partial RIA was published with *Welcome>Legacy* in July 2006 with a view to the production of a full RIA once the new strategy was developed and the impacts better known. We will prepare IAs (which have replaced RIAs) for those policies set out here where we believe this will have an impact on businesses, charities or the voluntary sector and will be developing and publishing them as individual strands of this Strategy are taken forward. This will enable us to ensure that any new individual policies within the new strategy are carried out with minimum burdens.

Equality Impact Assessment

An Equality Impact Assessment (EIA) of *Winning: A tourism strategy for 2012 and beyond* has been carried out in respect of the six strands of diversity- race, disability, gender, sexual orientation, religion and belief, and age – and has involved consultation with representative groups of the six stands. A full copy of the EIA, including details of consultees, will be available on the DCMS website by the end of September 2007 at www.culture.gov.uk/tourism2012



Eden Project, Cornwall

Appendix D:

List of acronyms

AA	Automobile Association	IOC	International Olympic Committee
ACAS	Advisory, Conciliation and Arbitration Service	KAM	Key Account Management
AEO	Association of Exhibition Organisers	LDA	London Development Agency
BAA	British Airports Authority	LGA	Local Government Association
BME	Black Minority Ethnic	LOCOG	London Organising Committee for the Olympic and Paralympic Games
BOA	British Olympic Association		
BSI	British Standards Institution	NAS	National Accessible Scheme
BV&E	Business Visits and Entertainment	NHS	National Health Service
DCLG	Department for Communities and Local Government	NOC	National Olympic Committee
DCMS	Department for Culture, Media and Sport	NQAS	National Quality Assurance Scheme
DBERR	Department for Business, Enterprise and Regulatory Reform	ODA	Olympic Delivery Authority
DFT	Department for Transport	OGC	Office of Government Commerce
DMS	Destination Management Systems	OJEU	Official Journal of the European Communities
DRC	Disability Rights Commission	OSSATE	One Stop Shop for Accessible Tourism in Europe
EIA	Equality Impact Assessment	RDA	Regional Development Agency
FDI	Foreign Direct Investment	RIA	Regulatory Impact Assessment
GDP	Gross Domestic Product	SQS	Sector Qualifications Strategy
GLA	Greater London Authority	TSA	Tourism Satellite Accounting
GVA	Gross Value Added	UKTI	UK Trade and Investment
IA	Impact Assessment	UNWTO	United Nations World Tourism Organisation
ICC	International Convention Centre	VAQAS	Visitor Attraction Quality Assurance Scheme
ICCA	International Congress and Convention Association	VICE	Sustainable tourism methodology

End notes

¹ Oxford Economics tourism impact study on the 2012 Games (September 2007), commissioned jointly by VisitBritain and Visit London. This report forecasts the 2012 London Games to generate tourism gains totalling £2.3 billion (at 2006 prices). Once allowances for displacement of visitors are made, the contribution is reduced to £2.1 billion for the UK.

² International Passenger Survey figures.

³ VisitBritain research.

⁴ See note 1.

⁵ 2004 figures are not included due to a problem with estimates from the UK Tourism Survey.

⁶ Labour Market Trends April 2005.

⁷ The data is provided by People1st and covers hotels; restaurants; pubs, bars and nightclubs; events; gambling; travel services; tourist services; visitor attractions; hostels; holiday centres; self catering accommodation; hospitality services; membership clubs; and contract food service providers. It does not include all tourism related industries such as caravan parks, campsites, museums, retail, heritage sites and zoos.

⁸ Such a visit is defined as one lasting more than three hours and not on a regular basis, so it would exclude weekly visits to the supermarket, but would include longer trips to out-of-town outlets or garden centres.

⁹ UNWTO.

¹⁰ Oxford Economics tourism impact study on the 2012 Games (September 2007), commissioned jointly by VisitBritain and Visit London.

¹¹ ONS annual survey of tourism figures released by the Office of National Statistics. The survey takes into account the visitors in the city for business and conferences and also those using Manchester as a 'gateway' to the North.

¹² The Partners for England initiative was launched in 2005 with an objective of bringing together the stakeholders in England's visitor economy to forge a new partnership to face the challenges of an ever evolving industry. The initiative is led by the South West RDA, the England

Marketing Advisory Board and VisitBritain, and supported by DCMS.

¹³ www.london2012.com/nrg

¹⁴ We will do this through the Ministerial Advisory Group, the RDA Tourism Leads Group, the LGA, Partners for England, the Nations and Regions Group and other forums.

¹⁵ Scotland, Wales and Northern Ireland are considering what arrangements would fit their plans to participate in the cultural programme. The Greater London Authority is also developing proposals on how to co-ordinate and deliver a pan-London cultural programme.

¹⁶ Analysis of the skills needed to improve the visitor experience and sports presentation for the London 2012 Olympic Games and Paralympic Games', based on a report prepared by Impact Research Limited for the Skills for Business Network in 2007 – note the report was not published at the time of DA clearance.

¹⁷ The consortium also includes SkillsActive, GoSkills, Creative and Cultural Skills, Skillsmart Retail and Skills for Justice.

¹⁸ This work is part of the wider sector qualifications reform programme outlines in Chapter 6.

¹⁹ Source: LOCOG.

²⁰ Improving information on accessible tourism for disabled people: European Commission 2004.

²¹ Source: Tourism for All.

²² Source: British Hospitality Association.

²³ These are estimates only and may not be wholly accurate.

²⁴ The National Skills Strategies are the public facing documents for the Sector Skills Agreements for hospitality, leisure, travel and tourism.

²⁵ Anholt – GMI Nation Brands Index 2006.

²⁶ People1st and BHA Survey 2005.

²⁷ *World Class Skills: Implementing the Leitch Review of Skills in England* was published in July 2007.

²⁸ Level 2 equates to good GCSEs; Level 3 equates to 2 A-levels; Level 4 equates to a degree (or their vocational equivalents).

²⁹ See Chapter 8 for details of the National Skills Strategy Monitoring and Implementation Group for England.

³⁰ An accompanying national Action Plan for England is being produced.

³¹ *Scottish tourism: the next decade - A Tourism Framework for Change; Achieving our Potential – A Tourism Strategy for Wales; and Tourism in Northern Ireland: A Strategic Framework for Action 2004-2007.*

³² The foundation for a sustainable approach to tourism was established by the former English Tourism Council in 2001 with the publication of *A Time for Action* and a series of indicators. The indicators were updated and republished in 2006.

³³ The ODA draft Olympic transport plan October 2005.

³⁴ Office for National Statistics (ONS).

³⁵ Current members are from VisitBritain; Visit London; People1st; British Hospitality Association; Business in Sport and Leisure; British Resorts and Destinations Association; British Homes and Holiday Parks Association; Tourism for All; Local Government Association, South West Regional Development Agency; Scottish Executive; Welsh Assembly.

³⁶ Source: *The Times*, 29 June 2006, "UK becomes top choice for FDI".

³⁷ Source: UNCTAD Website News, 9 January 2007.

³⁸ Hotel Demand Study, Mayor of London, June 2006.

³⁹ Source: *The Times*, 21 May 2007.

⁴⁰ Source: UK Budget Hotel Report, Boston Consulting, May 2006.

⁴¹ www.london2012.com

⁴² Tynedale Council; New Forest District Council; Birmingham City; the Broads National Park Authority; Greenwich Council and South Hams District Council. See www.idea.gov.uk/beacons

⁴³ www.communities.gov.uk/index.asp?id=1500045

⁴⁴ www.hm-treasury.gov.uk/consultations_and_legislation/barker/consult_barker_index.cfm

⁴⁵ www.culture.gov.uk/NR/rdonlyres/BE930BE7-95A0-4810-97AB-841855071B11/0/LiftingtheBurden.pdf

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