

# TOMORROW'S TOURISM

*A growth industry  
for the new Millennium*

Department for Culture, Media & Sport

## **FOREWORD BY THE PRIME MINISTER**

Britain is a wonderful country. Its people, landscapes, culture, character, history and traditions; its achievements, impact, successes, and standing; and its future, its vision, its potential. These are the things which make Britain great, and which make people - its own people, and people from across the world - want to see Britain, to know Britain and to understand Britain.

Tourism is central to how people from across the country and from abroad can begin to do that, and continue to do that. I want everyone, whether they're from different parts of the United Kingdom or from different countries around the world, to be able to enjoy the rich diversity of what Britain has to offer.

Of course, Britain has been a key tourist destination for many years - one of the most popular in the world. Currently, almost 26 million people arrive here every year to see what Britain is about. London is one of the world's favourite cities. All this will increase still further next year when our national Millennium celebrations place Britain at the centre of the world stage.

But the challenge facing us now is to create a competitive, world-class tourism industry in Britain which matches both the quality and the best of British business generally and the scale of tourism in Britain in particular. We must have a tourism industry which provides affordable quality, which is open to all and which makes the best use of Britain's resources. And a tourism industry which concentrates on our key resource - people.

I believe that the Government's new strategy for tourism - a strategy for England, but one which has clear implications for Scotland, Wales and Northern Ireland - will help towards this goal. It offers both vision and practical help. It is detailed and comprehensive. It is realistic and forward-looking. In partnership with all those working in tourism, I believe it is vital to our aim of making tourism throughout the UK as good as the best of British tourism already is - so that people can visit and enjoy the best of Britain.

**TONY BLAIR**

# CONTENTS

	Page
Foreword by the Prime Minister	
Executive Summary	1
<b>1 Setting the scene</b>	<b>5</b>
<b>2 Providing the right framework for tourism to flourish</b>	<b>8</b>
Creating the economic climate for enterprise and investment	9
Introducing a joined up approach	11
Providing effective support for tourism	13
<b>3 Developing and spreading quality</b>	<b>19</b>
Developing products to meet changing customer expectations	20
Providing better information for customers and businesses	38
Developing a trained and motivated workforce	46
<b>4 Encouraging the wise growth of tourism</b>	<b>57</b>
Developing and promoting a sustainable approach	58
Increasing access to tourism for all	73
<b>5 Monitoring progress</b>	<b>79</b>
Annex 1 The Tourism Forum	81
Annex 2 Additional data	83
Annex 3 References	85
Annex 4 Tourism - Towards Sustainability, Analysis of responses	88

## EXECUTIVE SUMMARY

Britain's tourism industry is big and growing bigger:

- c it employs 1.75 million people in 125,000 businesses;
- c it has accounted for one in six of all new jobs created in the last ten years;
- c it is worth £53 billion a year; and
- c it brought in 25.5 million overseas visitors to Britain in 1997 and is expected to attract 27.5 million in 2000.

These figures are impressive by any reckoning - but so too are those for the growth of tourism worldwide.

Tourism is now one of the biggest industries on the planet. International tourism receipts are:

- c £130 billion a year in Europe; and
- c £270 billion a year worldwide.

Worldwide international tourism receipts have grown by 12 per cent per annum over the last 10 years. Competition between countries for the tourist's pound will get ever more intense.

British tourism continues to grow - our international tourism receipts are the 4th largest in Europe and 5th in the world - but our share of the world market is declining.

Action is called for.

The Government is ambitious for Britain and British tourism. We are proud of what this country has to offer and want to make the most of it.

That is why we are setting a new, challenging target for the British tourism industry. We want to see it match and exceed the rate of global growth in the industry by the end of 2010.

But we also want to ensure that it grows in ways which are economically, socially and environmentally beneficial.

Meeting these ambitions will not happen automatically. Government and the tourism industry together need an effective strategy.

That is what this document seeks to provide. It identifies the responsibilities of all parts of national and local government as well as the industry and suggests a new partnership to raise standards.

Next year, Millennium year, offers a one-off opportunity to make a new start.

Throughout 2000, Britain will be a hive of activity. Our plans for Millennium celebrations touch every part of the country, including those not on traditional tourist routes, and focus on the Greenwich dome. They are raising enormous interest around the world.

The celebrations can be a springboard for our tourism industry into the new Millennium.

We want the millions of overseas visitors who will come in Millennium year to keep coming back in later years, telling family and friends that Britain is the place to be.

We also want to give British holiday-makers a fresh view of what their own country has to offer, and to give more people new opportunities to holiday in Britain.

We will only achieve this if we can guarantee a consistent high-quality experience for tourists, whether from home or abroad.

Our ambition is to help the industry turn itself from one perceived in the past as providing a low-wage, temporary form of employment with no career structure or proper training, and as a result with a low-quality product, into an industry that puts quality at the heart of everything it does.

Ours must be a world-class industry in every respect: the quality of its workforce; the energy of its marketing; the range of what it has to offer; and its care for the fabric on which it depends - our unique environment, heritage and culture.

Our proposals for the development of tourism in England and the promotion of Britain abroad are intended to make the most of a unique opportunity. We want to see our share of this vast and varied market increasing, not declining.

The strategy has been evolved in close partnership with an all-industry Tourism Forum and will complement the strategies developed for Scotland and Northern Ireland and the one being prepared for Wales.

Its success will depend in part on a better flow of information about the industry and its emerging trends. We suggest how such information can be collected and used. But it is essentially a plan for action, designed to benefit all those who holiday in Britain and all who work in the industry.

- C *Setting the scene* explains why we need a new tourism strategy.
- C *Providing the right framework for tourism to flourish* identifies the responsibilities of government in supporting the development of tourism.
- C *Developing and spreading quality* sets out the challenges facing the tourism industry in providing a high-quality services and information.
- C *Encouraging the wise growth of tourism* explains how we will ensure that growth in tourism is sustainable and that the benefits of tourism are spread throughout society.
- C *Monitoring progress* explains how we will ensure that the actions in this strategy are implemented.

15 action points are at the core of our plan. Together they form the basis of a coherent strategy to make our industry a world leader. They are:

- \* **a blueprint for the sustainable development of tourism** to safeguard our countryside, heritage and culture for future generations;
- \* **initiatives to widen access to tourism** for the 40% of people who do not take a long holiday;
- \* **more money for a more focused and aggressive overseas promotion programme** to bring in more overseas visitors;
- \* **new internet systems to deliver more worldwide tourist bookings for Britain** and to provide information on attractions and travel options;
- \* **new computerised booking and information services** to make it easier for people to book accommodation and travel;

- \* **a major careers festival and image campaign** to raise the profile, and promote the image, of careers in the hospitality industry;
- \* **a hospitality industry programme to sign up 500 employers to work towards *Investors in People* standard** to help raise the quality of training in the industry;
- \* **a new strategic national body for England** to provide leadership to the English tourism industry;
- \* **a new grading scheme for all hotels and guest houses** to give holiday-makers and business travellers consistent quality they can rely on;
- \* **new targets for hotel development in London and a further £4.5 million for marketing** to exploit its potential as a premier location for business travellers and holiday-makers and as a gateway to Britain;
- \* **more integrated promotion of our wonderful cultural, heritage and countryside attractions** to enable visitors to enjoy the full range of what Britain has to offer;
- \* **the development of innovative niche markets, such as film tourism and sports tourism**, to unlock the full potential of Britain's unique cultural and natural heritage;
- \* **encouraging the regeneration of traditional resorts** to allow leisure and business visitors to enjoy high-quality amenities and services;
- \* **more central government support for the regions** to give each part of the country better resources to develop their own identity and strengths; and
- \* **a high-profile annual Tourism Summit bringing together industry and government** to monitor progress, plan future action and keep all sides working in partnership towards the same objectives.



# 1 SETTING THE SCENE

To maximise tourism's contribution to the economy and to our vision for Britain we need to work with the industry to an agreed plan, with shared objectives and a common purpose.

- 1.0.1 For most of us "tourism" is simply the business of going on holiday. But tourism covers a multitude of leisure-time activities ranging from sight-seeing and shopping to attending sports events or visiting friends and relatives. Now film tourism, farm tourism, specialist activities and interests of every kind are extending tourism in new ways and into new regions. Business conferences, trade fairs, study courses and language learning spread the net wider still.
- 1.0.2 Tourists can be visiting from abroad or from within Britain; for many weeks or just on a day trip. What makes them all tourists is that they are travelling to a place outside their usual environment.
- 1.0.3 A myriad of businesses depend in whole or part on tourism, not just hotels and accommodation providers but restaurants, shops, theatres, transport businesses and a range of visitor attractions from museums to zoos. The impact of all this activity is enormous - on individual communities and on national self-image. It accounts for a significant part of all UK economic activity, as the figures below demonstrate. Yet it is in some ways still a hidden industry. Although they may be substantially dependent on income from tourists, a pub landlord, a coach operator, a shop assistant may not see themselves as anything to do with the tourist industry at all. Part of our purpose with this document is to help these diverse businesses to recognise their common interest in working together.

## 1.1 The benefits of tourism

- 1.1.1 As individuals, tourism offers us the opportunity for rest, relaxation, adventure and enjoyment. It helps us to bring family and friends together and to improve the overall quality of our lives. At national level, however, tourism offers much more than this. It is one of our most important industries:

C it generates wealth;

Tourism expenditure in the UK is estimated at **£53 billion**<sup>1</sup>, the "value added" by the tourism industry is estimated to account for between 4 and 5 per cent of UK GDP, and tourism is our largest invisible export<sup>2</sup>.

C it creates jobs;

Latest figures show that **1.75 million people** are directly employed in tourism - 7% of all people in employment in Great Britain. Tourism accounts for one sixth of the net increase in employment over the last ten years.<sup>3</sup>

C it promotes entrepreneurship;

Our tourism industry consists of some **125,000 businesses**, 80% of which are small (defined as having a turnover of less than £250,000 per annum).<sup>4</sup>

C it provides social and environmental benefits, and supports local diversity and cultural traditions.

Tourism is based largely on our heritage, culture and countryside and, therefore, needs to maintain the quality of the resources upon which it depends. Tourism can provide an incentive and income to protect our **built and natural environment** and helps to maintain **local culture and diversity**. Where tourism is popular, it underpins local commercial activity and services and it can help to **regenerate** urban and rural areas.

## 1.2 Why tourism needs a Government strategy

1.2.1 Tourism commands the attention of Government for a number of reasons. It:

C is an industry of growing economic importance;

C can be a driving force in bringing about sustainable development and has enormous potential for helping to regenerate our towns and cities, and our countryside; and

C can help create a more inclusive society by enabling more people to enjoy the benefits of a break or a holiday.

1.2.2 However, the industry suffers from a number of major weaknesses:

C its great diversity means that, collectively, it lacks the ability to think and act strategically;

C demand is seasonal and is subject to changes in fashion and interest;

- C it suffers from a lack of market information, or the ability to interpret and respond to it; and
  - C it is reliant on infrastructure determined by central and local government policies in areas such as transport and planning but, at the same time, it can place burdens on that infrastructure.
- 1.2.3 The Government and the industry share the view that if these weaknesses are to be addressed effectively we must work in partnership with shared objectives and common targets.

## 2 PROVIDING THE RIGHT FRAMEWORK FOR TOURISM TO FLOURISH

Tourism is of enormous importance to the economy of England and makes an impact on all our lives. It is a modern industry that needs a modern structure to help it succeed. This is why we are creating a more effective, strategic, leaner national body for tourism in England.

2.0.1 This chapter describes our plans to provide the right framework for tourism to flourish by:

- c creating the economic climate for enterprise and investment (section 2.1);
- c introducing a joined up approach (section 2.2); and
- c providing effective support for tourism (section 2.3).

## 2.1 Creating the economic climate for enterprise and investment

2.1.1 The Government has already introduced a wide variety of measures which will directly benefit the tourism industry such as the establishment of Regional Development Agencies (RDAs), the launch of the New Deal for the young and long-term unemployed and changes to the tax and benefit system. Of particular benefit to many parts of the tourism industry will be initiatives designed to foster small businesses: a new Enterprise Fund, the development of *Business Angel* networks, the Enterprise Investment scheme and a review of the banking sector which identifies innovative ways in which banks might build partnerships with growing businesses.

2.1.2 The Competitiveness White Paper reinforces the Government's commitment to reducing burdensome and outdated regulations and seeks to avoid introduction of new regulations which hold back the development of business. Poor regulation is particularly damaging for small businesses who have fewer staff to implement, and are less able to absorb the costs of, regulations. The Government is considering extending the deregulation order-making power to speed up the elimination of out-of-date and unnecessary legislation and has also begun work on measures to modernise areas of regulation which directly affect tourism. These include:

- C setting up the Better Regulation Task Force, which has published *Principles of Good Regulation*, aimed at those in Government departments drafting new regulations, and the *Enforcement Concordat*, which sets out a blueprint for fair and consistent enforcement across the country;
- C deciding that no regulatory proposal which affects businesses will be introduced without a thorough assessment of the risks, costs and benefits;
- C a review of the liquor licensing system, taking into account the main recommendations on licensing law made by the Better Regulation Task Force in July 1998. The Government has already accepted in principle all the Better Regulation Task Force's short-term recommendations on licensing, including reforms of licensing hours and tightening up on the sale of alcohol to children;
- C the recent White Paper, *Fairer, Faster and Firmer*, which set out the Government's plans to modernise immigration law, speeding the passage of genuine travellers and targeting resources on potential abuse. The Government recognises that the vast majority of travellers are genuine and

that Immigration Officers should be courteous, helpful, sympathetic and responsive to visitors arriving in the UK;

- C promoting guidance for planning officers and developers published by the Local Government Association's National Planning Forum Working Group on Tourism and Planning in 1998 and building on initiatives such as the English Tourist Board's guidance for smaller operators on handling planning applications;
- C introducing the National Minimum Wage (NMW) at a sensible level in line with the recommendations of the independent Low Pay Commission. The NMW will help some two million workers, many of whom work in the tourism industry. By stopping unscrupulous employers undercutting good ones on pay, and helping to improve workforce commitment and performance, the NMW will enable firms to compete on the basis of quality rather than on low pay; and
- C the development of a voluntary charter to improve and increase facilities for non-smokers, and the availability of clean air, in bars and restaurants. The agreed measures are detailed in the White Paper, *Smoking Kills*, published in December 1998.

## 2.2 Introducing a joined up approach

2.2.1 We are committed to ensuring better coordination across all Government departments in Whitehall and the regions. We want to ensure that the full potential of the tourism industry is understood and that its concerns and characteristics are taken into account in all relevant policy decisions.

2.2.2 For example, the Government's recent *White Paper on an Integrated Transport Policy* sets out a strategic approach to developing solutions to the transport realities facing the UK. The task facing the tourism industry is to decide how best to make use of the opportunities provided by the Integrated Transport White Paper and how to contribute to the achievement of the objectives set out in it. Our detailed proposals for how we intend to help the industry to do this are contained in Chapter 4.1 of this strategy, *Developing and promoting a sustainable approach*.

2.2.3 Similar considerations apply in the field of planning. Decisions about the design and development of new tourism facilities and infrastructure will play a key role in dictating the type, volume and value of tourism to the UK economy and society. It is important, therefore, that local planning authorities understand the needs of the tourism sector and do what they can to ensure that planning procedures do not constitute an unnecessary obstacle to tourism development. It is equally important that tourism developers appreciate the issues which planners have to face, and that they understand the system and are able to negotiate the complex procedures involved. Our detailed proposals for promoting a partnership approach to planning are contained in Chapter 4.1, *Developing and promoting a sustainable approach*.

2.2.4 To help us achieve this "joined up" approach the Government will:

- C give appropriate weight, both in Whitehall and the regions, to the needs and concerns of tourism and take account of its particular characteristics;
- C act as its champion, through DCMS, to increase awareness of tourism's potential and represent its interests;
- C look to the tourism industry to work through the Tourism Forum to achieve industry-wide consensus on major issues. These views will then form an important input into the objectives of the new national tourism body for England, as well as providing clear and strong messages to the Government. The Tourism Forum will continue to be chaired by the Secretary of State for

Culture, Media and Sport, though its secretariat will in future be provided by the new national tourism body; and

The Tourism Forum will continue to be composed of key industry representatives and others with an interest in the development of tourism. It will:

- (i) provide a mechanism through which key issues and concerns associated with the development of tourism can be discussed;
- (ii) provide a forum through which the Government and the national tourist boards can communicate with the tourism industry; and
- (iii) continue to receive the full attention of the Government.

- c hold a Tourism Summit, bringing together Ministers from DCMS and other Departments and representatives of the tourism industry to review progress and agree on future action to assist the development of tourism (see Chapter 5, *Monitoring Progress*, for more on the Tourism Summit).



## 2.3 Providing effective support for tourism

2.3.1 The market place should normally develop its own solutions in response to changes in customers' preferences. In some cases, however, "market failure" can prevent that happening and inhibit the successful growth of industry, particularly small businesses. The Government's role is to support the tourism industry by taking action to address market failure. It has conducted a thorough review to ensure that funding in support of tourism is used most effectively for this purpose.

2.3.2 The landscape of funding and support for tourism has become increasingly complex as new agencies have assumed tourism roles at international, national, regional and local levels. Because the structure of the industry and the nature of tourism markets has changed, the scale and type of support required has also altered. Since its election, this Government has been committed to finding more effective means of supporting tourism. In July 1998, we published a consultation document setting out a range of possible options. In light of the responses, we have now decided on a new structure which:

- C increases support for the promotion of international tourism to Britain;
- C creates a transformed strategic body for tourism in England;
- C provides greater emphasis on, and funding for, tourism in the regions of England;
- C emphasises the important contribution to tourism made by local authorities.

2.3.3 This new structure is the key to delivering this strategy and the new body for tourism in England will play an essential role in monitoring progress towards achieving our commitments.

### ***Increasing support for the promotion of international tourism to Britain***

2.3.4 The British Tourist Authority (BTA) has won much praise for its recent work to improve the overseas marketing of Britain as a major tourism destination. In particular, the Government has welcomed the BTA's new approach to agreeing joint marketing plans with the Scottish and Wales Tourist Boards, and its increasing cooperation with both the British Council and the Immigration Service.

- 2.3.5 As international competition heightens, however, it is crucial that the BTA keeps ahead of the field and further improves its effectiveness. To this end, the Government will provide an extra £5 million to the BTA over the next three years. The BTA in turn will ensure it delivers an even greater return for the public funds it receives, while maintaining an effective and efficient service which is responsive to market trends. The BTA:
- C will maintain a global network - it will be represented on all continents - but will focus its activity on 27 priority markets, releasing a further £5 million per annum to be reallocated to: new marketing campaigns, a world class information service in every office, further development of its Internet sites, and an improved service to the UK trade;
  - C has identified a further 11 overseas markets where it can retain an information service in the offices of the British Council or British embassies;
  - C has begun a user-led review of all activity involving its information technology and information systems which will be followed by an appraisal of the scope for using private finance to fund investments to improve the services it provides;
  - C will announce changes to its London-based operation early in 1999; and
  - C will be more responsive to the overseas marketing aspirations of England, Scotland, Wales, Northern Ireland and London. It has already signed overseas marketing agreements with the English, Scottish, Wales and London Tourist Boards and has agreements on specific initiatives with the Northern Ireland Tourist Board. London will in future be formally represented on the Board of the BTA, as are England, Scotland and Wales. At present there is a joint Chairman of the BTA and ETB, but the new national body for tourism will have a separate Chairman, who will also sit on the BTA Board. The Chairman of the Northern Ireland Tourist Board will also continue to participate in BTA Board meetings.

### ***Creating a transformed strategic body for tourism in England***

- 2.3.6 Tourism is of enormous importance to the economy of England and makes an impact on all our lives. It is a modern industry that needs a modern structure to help it succeed. That is why we are creating a more effective, strategic, leaner national body for tourism in England. The new body will have a tight remit and will focus on the national strategic framework rather than on the provision of direct services. It must both raise the profile of the industry and

provide strong leadership. Following our review and consultation, we concluded that this would be best achieved by a body concentrating its energies on five key areas.

- C *Research* - businesses need accurate and relevant information to enable them to plan ahead. Although some nationally commissioned research is widely available, many businesses, particularly the smaller ones, need assistance in using research to best advantage.
- C *Ensuring quality* - consistent and reliable quality is key to inducing visitors to return time and time again to a particular establishment or destination or country. High standards throughout the tourism industry are vital. The new body will work hard to get that message through to all of the industry to ensure that appropriate action is taken.
- C *Promoting best practice and innovation* - the new body will stimulate and encourage the many innovative people and businesses in tourism to share their ideas. We want it to develop ways of identifying and disseminating best practice and new ideas.
- C *Overseeing systems for data collection and analysis* - valuable data is collected at local and regional level but often lacks effective national coordination. The new body will ensure that a consistent format for information is used, that it is accessible to all, that inter-regional comparisons are made and that a national overview is maintained.
- C *Acting as a voice for successful sustainable tourism in England* - the new body will keep abreast of policy developments across all levels of Government that might impact upon - or contribute to the goals of - sustainable tourism. It will encourage the industry to take a proactive role in adopting sustainable tourism policies, and build links between the centre and the regions.

2.3.7 Sustainability - economic, social and environmental - is the common objective of these activities. The new body will have a central role to play in helping the industry and local communities gain maximum benefit from tourism. The new body will act as a centre of excellence, attracting high quality secondees with regional and industry experience, who can contribute fresh ideas and experience whilst learning more about the broader tourism picture.

2.3.8 More funding will be released for the regions and more work will be carried out directly at regional level in support of this strategy.

2.3.9 A small implementation team drawn from industry and Government is preparing detailed proposals for the establishment of this body. The team will also draw up demanding performance targets against which the new body will be judged.

***Providing greater emphasis on, and funding for, tourism in the regions***

2.3.10 While the new national body will have a key role to play, much work on the delivery of the strategy will be at regional level. With their existing wealth of expertise and experience, the Regional Tourist Boards (RTBs) are well placed to work alongside the new Regional Development Agencies (RDAs) and Regional Cultural Consortia, as well as local authorities and Government Offices in the Regions.

Regional Cultural Consortia will identify priorities for cultural initiatives in each region and encourage the various cultural interests (including tourism) to work together to achieve common aims. The Government will encourage representation on these Consortia from a wide range of interested parties, including local authorities, RTBs, non departmental public bodies (NDPBs) and the private sector.

2.3.11 Regional Development Agencies are a key part of the Government's commitment to regional development. With regard to tourism, they will be expected to:

- C include representatives from local authorities and businesses on their Board in order to be fully responsive to regional, sub-regional and local tourism needs;
- C ensure that their regional economic strategies address the contribution tourism makes to the economic development of the region;
- C work closely with RTBs to ensure that regional regeneration, infrastructure development and fund-raising opportunities are fully exploited;

Regional Development Agencies (RDAs) have been established in each English region outside London\* with a remit to:

- C further economic development and regeneration;
- C promote business efficiency, investment and competitiveness;
- C promote employment and enhance the development and application of skills;
- C contribute to sustainable development.

From 1 April 1999, working with regional partners, each RDA will be responsible for formulating a strategy which provides a framework for economic decision-taking at the regional level. They will also have an important role in advising Government on regional economic matters.

\* The London Development Agency will have a similar remit for London but will operate under the guidance of the Mayor and the Greater London Authority (GLA). The GLA will be established on 1 April 2000.

- C take account of the need for tourism to be sustainable and of the contribution tourism can make to both rural and urban economies.

2.3.12 In addition, RDAs will:

- C take the lead in administering regional regeneration programmes, which will total over £3 billion over the next three years. £160 million of additional money will also be available from the Single Regeneration Budget (dedicated to upgrading urban and rural environments in less prosperous areas of the UK) for areas where there is severe deprivation, for example, some coastal resorts.

2.3.13 Although the role of Government Offices for the Regions will evolve as RDAs come on stream, they will remain the voice of Government in the regions and will, for most practical purposes, be the main route for contact with individual RDAs.

Just one example of the work being done by Government Offices comes from the South West, where the Government Office will this year:

- C promote the South West Sustainable Development Round Table, which will define regional sustainable development indicators (see page 57 for more on sustainable tourism indicators);
- C conduct a major multi-modal transport study as part of a more strategic approach to transport issues in the region; and
- C build sixteen education partnerships in the region to help address many of the issues raised in Chapter 3.3, *Developing a trained and motivated workforce*.

### ***Emphasising the important contribution to tourism made by local authorities***

2.3.14 Many local authorities in England play an active role in promoting and developing tourism in their areas, providing much of the infrastructure and services on which visitors depend. They:

- C invest an estimated £75 million per annum in the development and promotion of tourism, which represents a 50 per cent increase in real terms since 1987;<sup>5</sup>
- C play an active part in the development of tourism through the support of local partnerships and as members of Regional Tourist Boards;
- C provide and manage most Tourist Information Centres (TICs);
- C ensure that standards are raised and reflect the needs of consumers by effectively enforcing statutory obligations (for example: trading standards, planning applications, good hygiene, building controls);
- C take a positive attitude towards tourism, play an active part in its development, and are mindful of issues relating to sustainability;
- C will be well-represented on the boards of RDAs, who will be encouraged to build on the work of local authorities' strategies when developing their strategies;
- C will be involved in the development of a cultural strategy for each region through their membership of the Regional Cultural Consortia;

- C play an important role in promoting the services available to small and medium sized businesses through the Business Link network and Training and Enterprise Councils (TECs); and
- C provide strategic direction and focus for the commercial sector, especially in areas where tourism is important to the local economy.

#### Case study

Two years ago, the tourism industry in Scarborough was characterised by disparate groups regarding each other as competitors, pursuing independent objectives and separate marketing programmes. Following a public meeting, the **Scarborough Forum for Tourism** was formed. This brought together private and public sector organisations and now provides a partnership mechanism to represent and coordinate the interests of the tourism industry. Residents also participate in the Forum, mainly through the Residents Association. The Forum, which meets regularly and whose membership is still growing, has led to:

- C new joint working programmes which have grown from improved networking between partners;
- C an ability within all organisations to see beyond their own priorities and take a strategic view of tourism development in Scarborough; and
- C better coordination among private sector companies when presenting priorities to the local authority and other regional bodies. The Borough Council is also more able to communicate with companies to identify priorities and agree policies.

### 3 DEVELOPING AND SPREADING QUALITY

On 31 December 1999 a huge new cultural and creative landmark will open to the public. The Millennium Dome in Greenwich will be an inspiration, a symbol of our spirit of adventure and a celebration of the best of what the UK has to offer.

3.0.1 Research gives us a picture of the changing nature of tourists. Tourists of the future may well be:

- C more affluent, but also more cautious with their money;
- C more likely than ever before to be travelling alone;
- C likely to take more breaks of shorter duration, as they juggle demanding work schedules (see Annex 2);
- C short of time (see Annex 2) and therefore seeking leisure and business tourism experiences which require minimum effort to research and book;
- C increasingly knowledgeable and keen to follow an approach which is tailored to individual needs, rather than buying a "package";
- C older (see Annex 2) but fitter, and less likely to accept a sedentary lifestyle.

3.0.2 These trends look set to continue - and to influence the development patterns of the tourism industry - over the coming decade.<sup>6</sup> These changing characteristics mean that the tourists of tomorrow will have quite different expectations of the tourism "product" than those of a decade ago. Quality and value for money are particularly important to this travel-experienced market. If it is to continue to prosper, British tourism must raise its standards to match the best in the world so it can satisfy the growing demands of both domestic and international tourists and encourage them to return time and again.

3.0.3 The Government has a role to play in achieving this, but the main actions must be taken by the industry, supported by national and regional tourist boards, local government and trade associations. Action is needed in three priority areas, to:

- C develop products to meet changing expectations (section 3.1);
- C provide better information for customers and businesses (section 3.2); and
- C develop a trained and motivated workforce (section 3.3).



### 3.1 Developing products to meet changing expectations

- 3.1.1 The key to success is achieving excellence - providing the best and most consistent quality experience for tourists. As the number and range of overseas destinations grows, we must raise standards if we are to compete successfully. Every business in tourism has a part to play in meeting the challenge of changing customer expectations.
- 3.1.2 Every destination must also compete for business - either alone or working with others (for instance, by forming partnerships or participating in benchmarking projects). Benchmarking is used within the hospitality industry and by, for example, the British Holiday and Home Parks Association, the British Resorts Association, and the Association of Leading Visitor Attractions.
- 3.1.3 The characteristics of visitors from **overseas** are changing. As Figure 3.1 shows, more than ever before are from Europe, and Europe accounts for virtually all the growth in expenditure since 1987. Most no longer stay for two weeks - the average length of stay has fallen from 11.5 to 8.7 days since then<sup>7</sup>.

**Figure .1. Percentage real growth in incoming tourism expenditure, by country of residence, 1985-87 to 1995-97<sup>8</sup>**

This figure has been removed to allow easier downloading of the text.

The information was as follows:

Country of residences listed in order of the highest percentage growth.

Far East  
Europe  
Rest of the world  
Australia and New Zealand  
North America )  
Africa ) decrease  
Middle East )

- 3.1.4 Meanwhile, although **domestic** tourism expenditure (expenditure in Britain by the British) has also grown, it has done so at a slower rate. For many years, there has been a trend away from the long seaside holidays which used to

dominate the domestic holiday market, while there has been growth in business tourism, in short breaks and in activity-based holidays.

The **Center Parcs** concept of a year round, all inclusive break in the forest was introduced to Britain in 1987. Aiming to capitalise on the trend towards shorter breaks, and focusing on demand for all-inclusive leisure experiences in natural environments, the concept caught the imagination of the British public and has been one of tourism's most successful developments over the last decade.

Quality has been as important as innovation in retaining competitive edge and Center Parcs has continued to enhance its product to meet changing customer needs. Customer requirements are continually monitored and, in response to feedback, new facilities have been opened which offer an even wider variety of leisure and sporting opportunities.

Center Parc's commitment to market research, quality control and training (which has resulted in high levels of staff motivation and retention) has led to year-round occupancy of over 90 per cent and a repeat business level of 65 per cent.

**Figure 2. Real growth in domestic and foreign holiday expenditure, 1987 to 1997 (1987=100; 3-year moving averages)<sup>9</sup>**

This figure has been removed to allow easier downloading of the text.

Domestic tourism, holidays over 4 nights or more peaked in the early 1990s.

The growth in foreign tourism was most marked between 1987-9 and 1992 to 1995.

- 3.1.5 There is much evidence to suggest that growth in domestic holidays of four nights or more - and particularly those of a week or more - has been adversely affected by the significant increase in foreign holidays taken by the British. Figure 2 suggests that during the last recession, domestic holiday expenditure grew slightly, while that on holidays abroad remained fairly static. Since 1992, however, expenditure on holidays abroad has risen significantly (to £17.2 billion in 1997), and much of this growth seems to have been at the expense of the domestic product (on which expenditure was £4.8 billion in 1997).

3.1.6 These trends and those illustrated in Annex 2 have significant implications for the development of tourism products. Over the next decade, the Government wants to help the tourism industry to respond effectively to changing customer expectations. There are six key areas that we believe need to be addressed:

- C the development of a coherent tourism strategy for **London**;
- C regenerating our traditional **resorts**;
- C improving the quality of tourism **accommodation**;
- C developing **business tourism**;
- C improving the quality and range of tourist **attractions**; and
- C developing products which promote our **culture, heritage and countryside**.

#### ***The development of a coherent tourism strategy for London***

3.1.7 London is a major international tourist attraction in its own right, as well as being a leading centre for international business tourism and the main gateway to Britain for international visitors (some 53 per cent stay in the capital during their visit - see Annex 2). Each year, London attracts millions of people from abroad and from Britain to visit its museums, galleries, historic palaces and theatre. London is now also recognised by much of the French press as the culinary capital of Europe, and the New Yorker magazine proclaimed the River Café in Hammersmith as the best Italian restaurant in Europe.

The Society of London Theatre's *Wyndham Report*<sup>10</sup> confirmed the vital economic impact of West End Theatre. In 1997, West End theatre-goers spent £246 million at the box office and a further £433 million on restaurants, hotels, transport and merchandise.

3.1.8 Without a strategic authority for London, however, it has become increasingly difficult - despite the efforts of the London Tourist Board and London First - to establish a coherent approach to the development of tourism in London, or to the development of infrastructure needed to support such a major tourist destination.

3.1.9 Accommodation shortages in London can lead to increased prices, reduced value for money in some establishments, and reduced competitiveness, all of

which compromises future growth potential. The London Tourist Board has been tackling this problem, in joint initiatives with London First, to promote an increased supply of accommodation and improve standards. In the last three years alone, 55 new hotels with some 5,000 rooms have been added to the capital's accommodation stock and a further 4,200 rooms are now under construction.

3.1.10 London needs to continue to invest if it is to benefit from tourism development. To encourage this:

- C the new Mayor of London, supported by the London Development Agency and the London Tourist Board, will develop a strategy to ensure that tourism continues to contribute fully to the London economy;
- C the Government will provide £1.5 million in each of the next three years for the London Tourist Board to work with the BTA on the overseas promotion of London as a gateway to Britain; and
- C the London Tourist Board will encourage further hotel development in the next Millennium to satisfy the anticipated demand for accommodation. The target is for a further 10,000 rooms to be built between 2001 and 2006.

### ***Regenerating our traditional resorts***

3.1.11 As more British people take their main annual holiday abroad, the domestic holiday market is increasingly characterised by shorter breaks and additional holidays. Over the years, this has led to a decline in the traditional core markets of many of England's established long holiday resorts, most notably those by the sea.

3.1.12 Many seaside resorts have been slow to adapt to this structural change in holiday trends. High season, summer income can no longer be depended on to cover for the low season. The result is often higher local unemployment, less investment in improving accommodation (for instance, en suite bathrooms) and reduced investment in other tourism infrastructure needed to meet the needs of the modern tourist. Insufficient investment in townscape improvements and the decline of the fishing industry have further weakened both the image and appeal of seaside resorts. Accommodation is too often seen as poor, especially when compared with modern, purpose-built facilities abroad or budget hotel chains elsewhere at home.

### **Table .1 Trips, nights and spending at the seaside as a percentage of all UK domestic tourism<sup>11</sup>**

	<u>1991</u>	<u>1997</u>
Trips taken at the seaside	40%	37%
Nights spent at the seaside	45%	42%
Spending at the seaside	49%	46%

3.1.13 Too many resorts have failed to adapt sufficiently to this new reality. There is now an urgent need for many of them to implement imaginative, market led and sustainable regeneration programmes. This may not be an option for all resorts, but there is growing evidence that those that do invest in the right way can lay the foundation for new prosperity.

3.1.14 Many resorts could make themselves more attractive to visitors wishing to take short break domestic holidays. Some, such as Bournemouth and Brighton, have successfully diversified into the business conference market (see page 30 for more on business tourism).

3.1.15 Others might diversify in different ways. They could develop into niche markets that attract particular types of visitor - for instance, those with a hobby or interest that can be pursued in, or near to, the resort (see page 43 for an example of targeted niche marketing). They could promote themselves to day trippers, or to elderly people, or as touring centres for the surrounding area. They might even need to consider a regeneration plan that involves attracting other industries to the area which can co-exist with and supplement the tourism industry. However, some resorts have not yet taken even the first significant steps to remedy their economic decline. They now face a considerable challenge.

3.1.16 As Table 1 shows, seaside and other resorts still form a major part of the tourism economy. We propose to help resorts that have the potential to benefit from regeneration programmes to develop modern and high quality tourism services in the following ways:

C we will promote the use of *Measuring the local impact of tourism*, a guidance pack issued by DCMS and the national tourist boards (see page 44 for more details). This is designed to help local authorities and others develop the information base which is necessary to building appropriate and business-like regeneration strategies, and to evaluating how they are working, so that, where necessary, they can be adapted and further developed;

- C in line with the Local Government Association's (LGA) own wider economic strategy, *A New Commitment to Regeneration*, we will work with the LGA to encourage local authorities in declining resorts to adopt an eight point local resort regeneration action plan - aimed primarily at tourism but also considering the economic and industrial potential of the surrounding area;

#### Case study

Successful regeneration of our coastal resorts requires an approach which identifies solutions to both infrastructure and superstructure problems. A recent EU-funded pilot study carried out by **Redcar and Cleveland Borough Council** identified the eight key stages involved in developing successful resort regeneration plans, which comprise:

- i. creating a realisation of the need for action and establishing a vision;
- ii. building political ownership and commitment to regenerate the resort;
- iii. creating a better understanding of visitor needs and tourism infrastructure;
- iv. analysing data and formulating regeneration ideas;
- v. identifying key issues which require redress;
- vi. formulating a comprehensive policy to regenerate the area;
- vii. defining detailed actions and setting target dates for implementation; and
- viii. monitoring progress on an on-going basis.

The resultant action plan would be a five year rolling programme based on research and encompassing a complete area development with zoning and plans for accommodation, infrastructure and, crucially, private sector investment.

- C we will encourage hotels, guest houses and other tourism businesses in an area to pool funds - perhaps through small, voluntary customer charges - for the enhancement of local tourism infrastructure (see page 61 for an example of a visitor payback scheme supporting the preservation of the environment);
- C RDAs will be encouraged to take account of existing local resort regeneration plans (or the potential for resorts to contribute to the local and regional economy) when drawing up their strategies;
- C the new national tourism body for England will work with regional and local authorities to identify opportunities where targeted funding might assist sustainable resort regeneration (for example, by ensuring that best possible efforts are made to secure seed corn or other financial support from the single

regeneration budget, qualifying National Lottery projects and the private sector);

- c the new national tourism body for England, together with the LGA and the British Resorts Association (BRA), will promote best practice in the area of resort regeneration and will monitor the success of regeneration plans; and

**Benchmarking** enables all types of organisations to examine their performance critically, so that they can adopt the better practices of market leaders. The Government backed United Kingdom Benchmarking Index enables small and medium sized companies to enjoy the advantages of high quality benchmarking that larger organisations with greater resources have benefited from for some time. The index is delivered through a number of business support organisations including Business Links, TECs, Local Enterprise Councils and trade associations.

Destination benchmarking is of significant potential use to the tourism industry. It looks not only at strengths and weaknesses of others, and how best practice can be shared, but also aims to identify the most effective means of raising tourism's profile and securing additional resources, for instance, from other Council department budgets. Following a successful pilot by the Southern Tourist Board and Winchester City Council, and a national pilot, RTBs will offer a full destination benchmarking service from 1999, using a standard approach for sampling visitors, survey methodology, questionnaire design and reporting format. The overall project is significant - it reflects consumer views, accords with Best Value principles for local authorities (indeed, it would often be locally driven), and is coordinated at regional level. However, the nature of benchmarking means that it also has national coverage and the new body for tourism in England will be responsible for monitoring progress and actively promoting best practice throughout the country.

- c RDAs, RTBs, the LGA and the BRA will identify opportunities for grouping resorts together and combining resources to maximise chances of success in European or other funding applications - perhaps by creating coastal zones or resort regions to raise the profile of the need for support.

There are over 3000 **caravan holiday parks** in Britain generating around £1 billion annually and catering for a fifth of the domestic holiday market. Many of these are in coastal locations.

The market for caravan holidays is changing, with less demand for touring caravans and more for holidays in static rented caravans. Park owners are starting to respond to these changes and are also reflecting improvements in living standards in the design of caravans. Initiatives such as the David Bellamy Conservation Awards, supported by the British Holiday and Home Parks Association, are helping to raise standards of environmental best practice.

### ***Improving the quality of tourism accommodation***

3.1.17 The travel-experience of today's visitors and an increase in visitors travelling for business has brought pressure for change within the accommodation sector. There has been increasing demand for higher quality accommodation (especially in the budget price range). In recent years, brands that have offered guaranteed quality at a fixed price - meeting consumers' increasing desire for convenience, consistent standards and value for money - have been especially successful. Figure 3.3 shows how two brands in particular - *Travelodge* and *Travel Inn* - have grown rapidly to meet this demand, which continues to grow.

**Figure .3 Growth in the UK budget hotel market, 1987-88 to 1998-99<sup>12</sup>**

This figure has been removed to allow easier downloading of the text.

In the year 1998/9 there were 43,000 budget hotels compared to under 5,000 in 1987 - 1988.

3.1.18 We have also seen a significant growth in the range of consortia, such as *Pride of Britain*, which offer guaranteed quality hotels with independent service and style, and others covering self-catering accommodation, such as *English Country Cottages*.

3.1.19 For growing numbers of visitors, the quality of accommodation and customer care are key factors in deciding whether or not to make a return visit. It is essential, therefore, that all our accommodation is able to compete with developments and standards in Europe.



The hospitality industry has developed a new customer service quality index - the **BHA-Scher Benchmark** - which will provide a robust and independent measure of customer service in major hospitality companies.

3.1.20 It is our objective to raise the quality standard of accommodation in Britain and promote this to the consumer. To this end, the new national tourism body will:

- C encourage widespread uptake of the new harmonised accommodation rating scheme for all serviced accommodation, consider its extension to other types of accommodation, and monitor progress against agreed targets;

The new national tourism body, the AA and the RAC are harmonising their accommodation schemes. Under the **new harmonised accommodation rating scheme**, being launched to consumers in September 1999, the same rating will be given whoever carries out the inspection. The new voluntary scheme's two standards are:

- C hotels will be rated from 1 to 5 stars, covering the whole visitor experience;
- C guest accommodation (including guest houses, bed & breakfasts, inns and farmhouses) will be rated from 1 to 5 diamonds, based entirely on quality.

The new scheme reflects consumer demand and places far more emphasis on quality: it will remove both the confusion currently caused by a plethora of signs, and the lack of clarity about what to expect from each kind of serviced accommodation.

The Government is so committed to raising accommodation standards that we will consider statutory measures if this voluntary approach does not result in an improvement in the quality of accommodation. To this end, the ETB in January 1999 held a conference to consider the case for statutory controls. A report by the new national body for tourism in England, together with an assessment of progress on the voluntary rating scheme, will be considered at the first Tourism Summit (see page 79 for more on the Tourism Summit), where a decision will be taken on further action.

- C promote customer awareness of the significance and meaning of the grading scheme;
- C extend and promote existing high profile award schemes, such as *England for Excellence*; and
- C encourage wider uptake of existing customer care training programmes.

***Developing business tourism***

3.1.21 One of the most lucrative, yet least well-acknowledged, components of our tourism industry is business tourism - this embraces meetings, incentive travel, conventions and exhibitions. Business tourists demand high quality standards, yield high receipts and utilise many venues otherwise poorly patronised out of season. As Table 2 shows, expenditure by business tourists has been growing more quickly than most other kinds of tourism.

**Table .2 Growth in real incoming tourism expenditure by reason for visit, 1985-87 to 1995-97, £ billion at 1997 prices.<sup>13</sup>**

	<u>1985-87</u>	<u>1995-97</u>	<u>% growth</u>
Holiday	4.38	4.90	12%
Business	2.69	3.48	30%
Visiting friends and relatives	1.57	1.93	23%
Study	0.68	1.17	73%
Others	1.04	1.24	19%
Total	10.35	12.72	23%

3.1.22 For the international business market, quality plays an important role in the choice of destination, so it is essential that we continue to develop world class facilities to maintain a competitive edge in this highly sought-after field. To assist this:

- C the Government has encouraged the industry to form a new Business Tourism Partnership to provide a powerful, national, unified voice speaking for business tourism;

- C the Business Tourism Partnership will work closely with RDAs to encourage them to take full account of business tourism when developing regional strategies;
- C the Business Tourism Partnership will encourage all sectors of the tourism industry, and especially those providing accommodation, to collect better data on their visitors and, with appropriate safeguards for confidentiality, to share this with conference and marketing bureaux to improve the effectiveness of their marketing programmes;
- C the BTA will increase the focus of its marketing activity on those sectors of the business tourism market that can most easily be influenced, especially meetings, incentives, conferences and exhibitions sectors;
- C the BTA will enhance the quality and frequency of its contact with the business tourism industry in order to exchange information and market intelligence on the needs of business travellers, to improve the coordination of marketing activities and to provide support for organisations bidding to bring international conferences to Britain; and
- C the Government will continue to work in partnership with local agencies and the business tourism industry to develop the concept of a large International Conference Centre in London and to encourage sufficient commercial backing to help it to become a reality.

## Case Study

Following a decline in spa visitors in the 1950s, Harrogate Borough Council chose to target the conference trade. A purpose-built exhibition hall opened in 1959, followed by further halls in the 1970s and, in 1982, a major conference auditorium, exhibition space and a modern hotel. By the early 1990s major capital investment was needed to upgrade the facilities to meet modern visitors' expectations.

The Council considered selling the facilities, but found no suitable buyer. Instead it created **Harrogate International Centre** (HIC), a trading arm of the Council, with a remit to act as a catalyst to stimulate the conference and exhibition trade. Crucial to the success of the venture was the forming of a partnership (known as the *A Group*) of the town's leading conference hotels. The *A Group* provides a one-stop-shop for conference organisers and pays commission on all business generated in the town by HIC. These funds are used for additional marketing or for upgrading conference facilities, thus helping HIC to secure Harrogate's position as a conference and exhibition venue and helping to support some 7,000 local jobs.

Last year, the HIC generated a net operating surplus of £1 million and, as a result of its activities, Harrogate hosted more than 2,000 conferences, 27 exhibitions and 29 trade fairs, attracting over 360,000 business visitors who spent over £100 million.

The English language is one of our greatest assets. **English Language Teaching** is one of the fastest growing sectors. The Association of Recognised English Language Services (ARELS) estimate that over 750,000 students come to Britain to learn English each year. On average, they stay for 42 days and spend £1,300 each, contributing over £1 billion to the economy.

Each year, ARELS holds an International English Language Fair, attracting delegates from over 40 countries. ARELS' 224 member schools, from all regions of Britain, offer a broad range of general and specialist courses for all types of learners from very young children to executives.

ARELS offers students an assurance of quality as all member schools are rigorously inspected by the British Council and must adhere to the ARELS Code of Practice which places additional demands on members, particularly in the area of student welfare and the care of juniors under 16.

### ***Improving the quality of tourist attractions***

3.1.23 Improvements in the standard of living and an expansion in car ownership for many sectors of the population have brought about an increase in day visits and associated expenditure. British people now make around 1.2 billion tourism leisure day visits a year, spending some £21 billion in 1996 and participating in a diverse range of activities.<sup>14</sup>

3.1.24 Although spending at attractions represents only a small proportion of overall tourist spending, it is often the wish to visit an attraction which draws visitors to a location - some major attractions such as Legoland or Alton Towers can form the sole motivation for a day visit. A proportion of the income to local hotels, restaurants and shops often depends on the quality and reputation of local attractions. The proliferation in the number and range of visitor attractions in the last two decades has not, however, always been associated with the best quality and some of our attractions will need to improve to compete with the best or simply to meet legitimate customer expectations.

3.1.25 Fashions in the attractions sector are particularly fast moving and we anticipate a great need for refurbishment and continued innovation over the coming years to sustain growth. This is especially the case as improved transport links make the major attractions in neighbouring European countries more accessible. Many new Lottery-funded projects (see page 32) will help in this respect by introducing a range of new experiences for visitors to Britain, but they will add major, new competition for existing operators. We also see a

need for the development of attractions based on new technology to compete with the best in Europe. More innovative packaging of attractions may also be needed to appeal to those consumers who have plenty of money but are short of time. The Government wants to see:

- C the existing *Visitors Charter* strengthened and extended more broadly throughout the sector;
- C the attractions industry providing simple and standardised signage and information to help visitors assess the suitability of each site to their needs prior to the visit;
- C the provision of training courses designed for staff at visitor attractions to improve the quality of customer service and match the standards visitors expect;
- C more attractions signing up to the Tourism for All National Accessibility Standards (see page 73 for more information on these standards); and
- C the extension of quality benchmarking (including that for the Association of Leading Visitor Attractions, and now open to all attractions with over 100,000 visitors per annum<sup>15</sup>, and by the CBI<sup>16</sup>) within the sector, and a series of workshops for attractions to promulgate the results of such studies.

3.1.26 The new national body will need to develop a strategy for tackling these issues. It will need the support of regional tourist boards and local authorities to facilitate action by the attractions industry itself.

#### ***Developing products to promote our culture, heritage and countryside***

3.1.27 Our cultural heritage, countryside, language and tradition are likely to remain the major reasons for visiting Britain, but now an increasing proportion of visitors are attracted by contemporary culture - for example, our urban street and night life, fashion and design. This trend is presenting many destinations with significant new opportunities.

##### *(i) The Arts*

3.1.28 The National Lottery is permitting a renaissance of the infrastructure for Britain's arts and heritage. New and redeveloped theatres, galleries, concert halls and museums are appearing throughout the country. This major

programme of capital works is continuing the recent trend of opening up new areas for tourism, particularly in Britain's cities: building on the success of attractions like the Tate Gallery in Liverpool and the National Museum of Photography, Film and Television in Bradford are the National Centre for Popular Music in Sheffield, the Museum of Scotland in Edinburgh, and the National Glass Centre in Sunderland.

(ii) *The Millennium celebrations*

3.1.29 By 2001 we will have seen the opening of a huge range of new attractions, transforming Britain's cultural landscape, including: a national cycle network throughout the United Kingdom, the new Lowry Centre in Greater Manchester, the Millennium Stadium in Cardiff, the Eden project in Cornwall, the new Science Centre in Glasgow, the International Centre for Life in Newcastle, the new Tate Gallery of Modern Art in London, and Dynamic Earth in Edinburgh.

3.1.30 On 31 December 1999, a huge new cultural and creative landmark will open to the public. The Millennium Dome in Greenwich will be an inspiration, a symbol of our spirit of adventure, and a celebration of the best of what the UK has to offer. It will also be a huge attraction for visitors from the UK and abroad. The BTA estimates that the Millennium Experience will generate between £300 million and £500 million of additional expenditure by overseas visitors; and that across the UK the Millennium celebrations will generate some £1 billion of extra spending by overseas visitors.

3.1.31 To maximise the benefits from this unprecedented opportunity, the BTA has launched *Britain: Now is the Time*, a three-year campaign to position Britain as the preferred world tourism destination for the year 2000 and beyond, including:

- C a PR and promotional campaign in Europe, the USA and the Far East, developed in partnership with Embassies, the British Council, the New Millennium Experience Company and travel industry organisations;
- C the launch of "The New Map of Britain", covering all new millennium attractions;
- C provision of a comprehensive millennium information service to consumers; and

C advice and support to members of the travel trade and tourist attractions.

(iii) *Sport*

3.1.32 The Government is committed to bringing major international sporting events to this country. *Euro 96* demonstrated the boost which can be given to tourism by such events: it was entirely self-financing and attracted some 100,000 foreign visitors, generating more than £40 million of extra tourist expenditure.<sup>17</sup>

3.1.33 The BTA is working with the English Cricket Board to ensure that its marketing campaign maximises tourism benefits from the 1999 Cricket World Cup, and is supporting the Wales Tourist Board's promotion of the 1999 Rugby World Cup.

(iv) *Film*

3.1.34 A number of towns and cities are now capitalising on the growing strength of the British film industry and the resultant interest in British film locations. One example among many is Sheffield, which witnessed a surge in tourist visits following the success of *The Full Monty*.

3.1.35 To help enable the tourism industry to capitalise on the growing success of British film:

C the Government will encourage more effective cooperation between RTBs and regional film commissions;

C the BTA will shortly launch a new version of its successful *Movie Map*, promoting the wide range of film locations throughout Britain; and

C the Government will encourage more local authorities to facilitate film-making in their areas. Drawing on practical experience in Bath, Liverpool and other successful film venues, we will discuss with film commissions and tourist boards the possible production of best practice guides for local authorities.



The Bath Tourism Bureau is comprised of the Tourism and Conference Bureaux, which market Bath and North East Somerset as a leisure and conference destination; a Tourist Information Centre; and the **Bath Film Office**.

The Film Office, funded by the local council at a cost of £46,000 per annum:

- C offers free advice on locations, crew and facilities;
- C has attracted over £3 million of production spend into the local economy; and
- C has drawn up a *Film Makers Code of Conduct* to ensure that filming in the city is properly directed so as to minimise disturbance and inconvenience to residents.

It has been highly effective in marketing Bath worldwide and has gained the area coverage in film and media which could not have been achieved through traditional marketing and communications channels.

(v) *Our heritage and countryside*

3.1.36 Britain's historic buildings, sites and landscapes are enormously important to our appeal to inward and domestic tourists. For example, the UK has within its shores fifteen World Heritage Sites, many of which are major attractions. Among these are the Tower of London, Stonehenge, the city of Bath, Canterbury Cathedral, Edinburgh Old and New Towns, Maritime Greenwich and the Giant's Causeway.

3.1.37 Visitors may also come to see the many small properties, some of which - like the house in Forthlin Road, Liverpool, where Sir Paul McCartney grew up - have only recently been acknowledged as a significant part of our heritage. Others, such as Osborne House in the Isle of Wight, where *Mrs Brown* was filmed, attract new visitors because of their connection with films and television.

3.1.38 It is estimated that there were over 70 million visits made to historic properties in 1997.<sup>18</sup> Improved marketing and publicity are attracting more first-time visitors and better presentation and facilities are encouraging repeat visits. As well as guided tours and audio-visual presentations, there are many interpretive exhibitions and multi-lingual features for foreign visitors.

3.1.39 *European Heritage Days* provides free access over certain weekends in September to buildings that are not normally open to the public or usually charge for admission. Such events, and those who promote the properties of the National Trust, English Heritage, and members of the Historic Houses Association, can do much to encourage visits. While each of these bodies already publicise their properties through in-house and commercial publications, we see value in greater cooperative work - together and through the BTA, which already does much to promote Britain's heritage abroad.

ICOMOS UK (The International Council on Monuments and Sites UK) recognises that tourism can be a beneficial activity with the potential to serve the local community and the place, as well as the visitor. The ICOMOS Cultural Tourism Charter, first published in 1976 and since revised, contains seven principles for the balanced development of tourism, including visiting monuments and sites of archaeological, architectural or historic importance, as well as gardens or outstanding natural features.

3.1.40 The quality of the countryside provides the basic resource on which much tourism depends. In turn, many rural areas are also benefiting increasingly from tourism. Many depend - in part at least - on tourism income for their survival and prospects for sustainable growth. In terms of numbers employed and turnover, countryside recreation is now a larger industry than agriculture. Protection of our fine landscapes, making the most of the rights of way network and other access opportunities (see page 77-8 for more on access to the countryside), and the promotion of local products are all contributing to its success.

3.1.41 Both the Rural Development Commission and the Countryside Commission have played important roles in promoting tourism in the countryside. From 1 April 1999 they are being merged to form the Countryside Agency. The Countryside Agency will work for people and places in rural England. It will be responsible for advising Government and taking action on issues relating to the environmental, economic and social well-being of the English countryside. The Countryside Agency will work with partners on approaches to sustainable rural tourism which: will help people to enjoy the countryside; will provide jobs; will support local services; and will encourage the conservation of this important natural asset, so preserving its attraction for visitors.

England has a rich, diverse and beautiful landscape. A clearer understanding of what contributes to its character - and of the forces for change - will enable sustainable management of the landscape based on informed decision-making.

In 1996, the Countryside Commission, English Nature and English Heritage decided on a new approach to landscape assessment, which looked at the whole of our countryside in order to provide a consistent and comprehensive understanding of its character. This resulted in the country being mapped into 159 separate, distinctive character areas all described in full-colour regional volumes. The features that define the landscape are recorded in individual area descriptions. Each description evokes what makes one area different from another, providing an explanation of how that character has arisen and how it is changing.

The **Countryside Character** map and area descriptions provide a national framework for more detailed landscape assessment. Guiding policy developments and informing decision-making, these descriptions give context to local planning, action and control of development. See [www.countryside.gov.uk](http://www.countryside.gov.uk) for more details.

3.1.42 National Park Authorities, the Broads Authority and the boards and committees set up in the New Forest and some Areas of Outstanding Natural Beauty have a key role to play in tourism. They produce recreation management plans; provide information, often with wardens; and protect the special qualities of their areas. They also feature in a number of the best practice examples later in this strategy.

3.1.43 The Ministry of Agriculture, Fisheries and Food (MAFF) also has a strong interest in the economic vitality, conservation and public enjoyment of the countryside. In certain designated areas, MAFF provides support to farm businesses which are looking to diversify into tourism (see page 62 for more on farm tourism). These new businesses often provide increased opportunities for women.

## 3.2 Providing better information for customers and businesses

3.2.1 For businesses to prosper and customers to be well-served, each must know about the other. Businesses which understand and can identify the needs and wishes of current and potential customers can best develop suitable products and services and, through targeted marketing, ensure customers find out what is available. Over the last decade, new technology has led to changes in the way many tourism businesses and destinations manage themselves, learn about their customers, disseminate information and facilitate the booking of their products.

3.2.2 New technology is also changing the way that customers find out about and make their purchasing decisions. There will be further rapid growth in the use of the Internet, teletext and interactive television. Not everyone has access to new technology, so brochures and guidebooks will continue to play a significant role in the tourism decision making process, but they will need to be tailored to cater more directly to the changing and specific needs of customers. The priorities for action are to:

- C encourage the development of destination management systems;
- C make it easier for tourists to find out about Britain;
- C learn more about customers; and
- C provide the industry with better information about the tourism market.

### ***Encouraging the development of destination management systems***

3.2.3 Developments in information and communications technology are radically altering the way tourism businesses disseminate information and facilitate the booking of their products. Historically, customers received information about tourism opportunities through a range of media, including advertising, tour operators, travel agencies, tourist information centres, letting agencies and direct. Today, these sources of information dissemination are still dominant for British tourism. The information revolution is, however, offering tourism businesses and destinations new ways to communicate information to customers.

3.2.4 The information revolution in tourism was initially driven by the development of computerised reservation systems (CRSs). Almost all airlines, tour operators, travel agents and larger hotel companies now operate, or are linked

into, a CRS system. The smaller companies that comprise 80 per cent of the tourism industry have been less able to benefit from the potential of these technologies.

- 3.2.5 The advent of the Internet provides new opportunities. The Internet allows databases of local products (accommodation, tourist attractions, events etc) to be made accessible to visitors. Real-time bookings are feasible through outlets such as local Tourist Information Centres, web sites and touch-screen kiosks.
- 3.2.6 A small number of leading destination management organisations (DMOs) are now integrating the software for these functions with their other business needs, notably membership subscriptions and/or the sale of advertising to their local tourism enterprises, as well as print production and office systems. These are known as destination management systems (DMSs). Developments in DMSs mean that smaller companies now have the ability collectively to benefit from new technology. DMSs provide organisations that aim to manage and promote their local or regional tourism industry with the ability to network their activities, not only within their own area but also, potentially, on a national basis.

**South Warwickshire Tourism** is a public-private partnership established in 1997 by Warwick Castle, the Shakespeare Birthplace Trust, the Royal Shakespeare Company and the district councils of Stratford-upon-Avon and Warwick. The partnership has created an electronic destination management system (DMS) to market the area cost-effectively and to service visitor enquiries quickly and efficiently. It has 416 private sector members, all of whom pay an annual fee.

The DMS comprises a database of all tourism services in the area, including accommodation, attractions, shops, restaurants and transportation which:

- C provides detailed information about the tourism product (for example, up-to-date information on room availability and prices);
- C feeds the web site known as *Shakespeare Country*, providing potential visitors world-wide with immediate and up-to-date information;
- C provides information directly to tourists within the town through a series of touch screen kiosks and through tourist information centres.

The DMS is also a proactive marketing tool. Customers' addresses and other basic information can be logged to form a valuable database for marketing initiatives.

3.2.7 The development of DMSs marks a significant opportunity for tourism destinations and small companies. They are, however, being developed by separate companies using differing technologies. This could make it difficult for tourism destinations to exchange information or provide a streamlined booking service for visitors who wish to book a multi-centre trip. With BTA's assistance, the new national tourism body will take forward work begun by the ETB to address the need to improve coordination and support for the networking of DMSs between Destination Management Organisations. A working group led by the national tourism body and the BTA, and with members of the Tourism Management Institute and the LGA, is:

- C preparing a model set of service level standards;
- C researching common data standards in order to facilitate the networking of systems in the longer term;
- C preparing a model DMS business plan; and

C convening groups to exchange expertise in the delivery and management of DMSs.

3.2.8 Further action is needed if England is not to fall behind its competitors. One of the strategic objectives for the new national body will be to lead the development of common standards, the further development of tourist board databases, and to coordinate the production of a fully integrated tourist information network which can serve the needs of every type of DMO.

3.2.9 Complementing the development of tourist information is the provision of a national, integrated public transport information system by 2000 (one of the commitments made in our White Paper on Integrated Transport Policy - see pages 67 to 69 for more). The Government is also examining the potential for delivering integrated public transport and tourist information to tourists in a user-friendly way, through electronic or other means - a pilot project will soon commence.

### ***Making it easier for tourists to find out about Britain***

3.2.10 While new technology is enabling the wider distribution of tourism products to the consumer, consumers are increasingly able to be pro-active in selecting the information they wish to receive. Digital television will, within the next few years, expand the opportunities available.

3.2.11 Further changes in the way tourist information is provided and in the mode of booking can be expected. Wider use of the Internet combined with interactive digital television, in particular, may have a strong, positive effect on convenient, well-promoted tourism products. For small businesses in particular, this mode of communications is likely to provide a cheap marketing channel to the global marketplace. It will make it easier for customers - especially computer-literate younger people - to book tourism products.

29 per cent of UK adults now use the **Internet**.<sup>19</sup> Travel information is a major sector for Internet users. In the USA there are now four Internet travel agencies in the top fifty travel agencies and 27 per cent of households that engage in online shopping have made an online travel booking.<sup>20</sup> In total, 6.7 million US adults used the Internet to make a travel reservation in 1998, up from 5.4 million in 1997.<sup>21</sup>

Globally, increased access to the Internet is likely to result in a large growth in travel bookings through this medium, with forecasts of \$21 billion of sales for 2001 and \$29 billion by 2003, up from \$800 million in 1997.<sup>22</sup>

3.2.12 The BTA has two major projects under development that together will help its award-winning website, *www.visitbritain.com*, to reach out even more effectively into overseas markets and deliver more tourist bookings for Britain. It plans to:

- C launch 36 new websites - there will be one for each country where the BTA is active or has an information service and the majority will be launched in 1999 - with information tailored to local needs and in the local language. The BTA has developed a state-of-the-art web publishing system to enable its staff throughout the world to create web pages quickly and easily; and
- C offer on-line accommodation bookings to the one million or more annual users of *VisitBritain*. The BTA, in partnership with leading operators of web reservation systems, aims to provide a service which will both help tourists find and book the right accommodation for their needs and enable hotels and other accommodation providers to accept internet bookings via *VisitBritain*.

3.2.13 While investment in technology is essential to prepare the tourism industry for the next Millennium, this alone will not be sufficient to raise the profile of Britain as a destination over the next decade. Consumers already have access to more information about tourism products than ever before and too much information is as unhelpful as too little. Effective promotion will require the development of information which is immediately recognisable and tailored to the needs of consumers. To address this issue:

- C the BTA and its partner national tourist boards have developed consistent, coherent and recognisable brand values for Britain and its component parts;



- C the BTA is building and strengthening regional overseas marketing consortia in England, whose objective is to deliver coherent marketing activities consistent with the established national values and images; and
- C the ETB has supported the development by local partnerships of up to ten sub-regional brands. A pilot programme offered training and advice in developing brands and help in drawing up designs and editorial briefs.

### ***Learning more about customers***

- 3.2.14 Over the last decade, there have been significant advances in tourism marketing techniques which have improved our understanding of tourists' behaviour, needs, characteristics and motivations. The BTA has invested considerable resources into identifying those consumer "segments" in overseas markets which can most easily be influenced to visit Britain. By focusing its marketing activity on these segments, it has delivered significant improvements in its effectiveness. (The BTA estimates that tourism expenditure in Britain influenced by its marketing activity has risen from around £750 million in 1994-95 to over £1 billion in 1997-98.)
- 3.2.15 Over the last three years, the BTA, in partnership with the ETB, RTBs and the national tourist boards in Scotland, Wales and Northern Ireland, has held over 100 market segmentation training courses to advise tourist boards, local authorities and individual tourism businesses on the use of market segmentation techniques. Segmentation allows planning in both the long and short term, and informs decisions on the products that consumers will be looking for.
- 3.2.16 The BTA is now investigating the potential benefits of relationship marketing - an IT-based process for maintaining regular, targeted, two-way communication with individual customers and prospective customers. This technique makes it possible to develop a profile of visitors according to a range of criteria, such as age, type of employment, area of residence, hobbies and interests, travel preferences and lifestyle characteristics. It marks a step forward in the understanding of tourism markets and will provide access to detailed information about specific market segments, their needs and tourism requirements.
- 3.2.17 Once developed, visitor profiles can be used, in combination with commercially available databases which use detailed post code data, to identify potential new markets. Such tools offer a very powerful mechanism to target specific

messages to precisely defined groups of consumers. The BTA and its partner organisations will:

- C promote the wider use of market segmentation and develop relationship marketing methods, so that maximum benefit is derived from the funds that destinations and businesses use in marketing their products; and
- C refine and improve dissemination of information on visitor profiles.

Case study

The **Hotel Piccadilly** in Bournemouth has had notable success by targeting its marketing. A few years ago, it was considering redeveloping a little used ballroom into a leisure facility, in line with the approach of many other hotels.

Concerned about the cost of the redevelopment, Don Cowie, the owner of the hotel, decided to look again at the market for the ballroom in its existing format. The result was a great success. He suddenly realised he had a commodity many hotels had lost and that there was an unfulfilled market of ballroom and sequence dancers. Now the hotel specialises in dance holidays, has been able to develop a substantial database of clients and advertising is limited to inexpensive specialist magazines. More importantly, it enjoys higher occupancy levels than many similar hotels and has fewer competitors.

***Providing the industry with better information about the tourism market***

3.2.18 Good quality and up-to-date information is an essential pre-requisite for understanding the changes in our tourism markets and effectively employing market segmentation techniques. Timely availability of information will dictate the extent to which business can use such techniques effectively.

3.2.19 Tourist boards and other Government agencies provide an essential service in collecting and disseminating tourism statistics at a national and regional level. The tourist boards' *Research Liaison Group* (which coordinates the research activities of the BTA and the national tourist boards of England, Scotland, Wales and Northern Ireland) has an important role to play in ensuring the tourism industry has access to relevant and up-to-date market information.

3.2.20 The Government would like to see the *Research Liaison Group (RLG)* maximise the use of the wealth of existing tourism data to better meet the needs of the tourism industry. Specifically, we will ask the RLG to:

- C develop a new website to act as a more effective signpost to existing information sources;
- C follow-up the guidance on measuring the local impact of tourism with practical advice to local authorities, local tourist boards and local operators on marketing and customers, and on using information on local sustainable development (see page 58 for our plans for developing national indicators of sustainable development);

DCMS's 1998 guidance pack on **measuring the local impact of tourism** was produced to meet the needs of local authorities, regional and local tourist boards and the industry. Good strategies at the local level need to be built and evaluated on relevant and reliable statistics, collected cost-effectively. The guidance pack, which was prepared in association with the national tourist boards, leading members of the industry, local authorities and other researchers, helps users examine their information needs and draw up an action plan to incorporate existing data and the development of a suitable information system. Many local authorities are already well down this road. There is good practice to share.

We have circulated copies of the guidance widely, for example through the Local Government Association, the British Resorts Association and professional bodies. Further copies are available from DCMS.

- C review the needs of users of national statistics and aim to introduce a new tourism survey in 2000; and
- C work with the Office for National Statistics to disseminate to the tourism industry more relevant and timely, quarterly, sub-national data from the International Passenger Survey.

3.2.21 Meanwhile, the Government intends to:

- C maintain our compliance with the EU Directive on Tourism Statistics so as to secure comparable information from other countries in the European Union; and
- C examine the relative costs and benefits of compiling a satellite account for tourism in the UK that complies with emerging international standards set by

the European Commission and reflects the convergence of the approaches taken by the OECD and the World Tourism Organisation. (A satellite account is a structured way of tracking the effects of tourism throughout the economy.)

- C recognising the contribution research can make to policy formation and evaluation, for the last two years DCMS has provided financial support for the Tourism and Leisure Research Network (TOLERN), which meets regularly to exchange research ideas, methods and results.

### 3.3 Developing a trained and motivated workforce

3.3.1 Tourism is a major and growing employer in Britain. Over the last ten years, the number of people in employment in tourism has grown by 200,000 to over 1.75 million. As Figure 4 shows, tourism employment has grown at a faster rate than most other industries and, in fact, tourism accounts for over one-sixth of the net increase in employment across the British economy over the last ten years.

**Figure 4 Growth in employee jobs in (a) tourism related industries and (b) all industries, 1987-88 to 1997-98 (1987-88=100; 4 quarter moving averages)<sup>23</sup>**

[This figure has been removed to allow easier downloading of the text.]

3.3.2 People are vital to the delivery of quality tourism products; however, labour turnover in tourism can be high and there are persistent skill shortages. Forward-looking tourism businesses recognise that investing in their staff makes good business sense. They know that well-trained and motivated staff raise product quality, improve customer satisfaction and lead to higher profits. They offer opportunities for gaining appropriate vocational qualifications by the provision of training and development of all their staff, good working conditions and an adequate financial reward. However, because there are still cases of poor management and employment practice, low rates of pay, and unsocial working hours, the perception of the industry as a whole is damaged. This causes difficulties for even the best of employers. Action is needed to:

- C provide the **skilled employees** the tourism industry needs;
- C **challenge negative perceptions** about careers in hospitality;

- C encourage best **employment and management practice**;
- C encourage investment in **training**; and
- C enhance industry **coordination** on training.

***Providing the skilled employees the tourism industry needs***

- 3.3.3 The Government is committed to working with the tourism industry to ensure it is able to take full advantage of the New Deal initiative. New Deal offers an opportunity for the industry to recruit the staff it needs and to train them to the standards they require. The New Deal also helps employers to tackle their recruitment and skills shortages and invest in their own future while contributing to ending the waste of youth skills and long term unemployment.
- 3.3.4 We recognise that any successful initiative to provide the tourism industry with access to a skilled and motivated workforce will be underpinned by partnerships with relevant National Training Organisations (NTOs). A list of NTOs can be accessed using the Internet - [www.open.gov.uk](http://www.open.gov.uk) and then searching for NTOs.
- 3.3.5 NTOs lead the nation's drive for world class skills; are the nationally recognised voice of employers on education and training; bring employers together to say what skills are needed in their industries and how those skills can be achieved; and lead the development of qualifications based on national occupational standards. In implementing this strategy, we will work with the wide range of NTOs active in tourism.

**Figure 5 Reasons for difficulties in recruitment (as reported by employers)<sup>24</sup>**

[This figure has been removed to allow easier downloading of the text.]

Information as follows

Percentage Range	Reasons
30-40%	skills shortages

20-30%	shiftwork/hours, poor pay
10-20%	no interest in work, seasonal/part-time work, other location
0-10%	high staff turnover

- 3.3.6 The Government recognises the importance of having a skilled workforce. The National Skills Task Force began its work in April 1998 and has been charged with advising on the main skills gaps and shortages in the labour force and on how these can be addressed. The Task Force's preliminary report - *Towards a New Skills Agenda* - was issued in September 1998. DfEE has since produced a recruitment guide for small firms called *Mind the Gap* which provides guidance on how to fill the skills gap and improve recruitment methods.
- 3.3.7 The Government has already taken action across all sectors by allocating an additional £19 billion for education under the Comprehensive Spending Review. It will work through Government departments, trade associations and the industry to ensure that this additional funding across all sectors, including tourism, is used to best effect. The Government aims to prepare young people better for the world of work; to strengthen partnerships between businesses and schools; to increase the employability of students in higher education; to develop the skills the economy and employers need; and to give them a secure foundation for lifelong learning, work and citizenship.
- 3.3.8 The new Department for Education and Employment (DfEE) publication, *Learning and working together for the future*, sets out the strategic framework for the development of education and employment services up to 2002.
- 3.3.9 There is provision for the hospitality industry in further and higher education institutions. The Higher Education Funding Council for England has carried out a review of provision for the hospitality industry in response to approaches from representatives of the higher education sector, the hospitality industry and professional associations. The Further Education Funding Council (FEFC) Inspectorate reported in March 1998 that most further education and tertiary colleges offered a wide range of courses in leisure and tourism. The Funding

Councils will continue to keep the adequacy and sufficiency of higher and further education provision under review.

### ***Challenging negative perceptions about careers in hospitality***

3.3.10 There has been a perception that employment in tourism, particularly in hospitality, is relatively low paid, menial and requires anti-social working hours, and so turnover in the industry has been high. There have been consistent skills shortages, making some jobs difficult to fill. Seasonality in some sectors of the hospitality industry may act as a further deterrent to attracting a skilled, professional workforce to some jobs.

3.3.11 To attract and retain a skilled and motivated workforce, the industry must challenge these negative perceptions and ensure that the jobs offered are attractive ones. The Government has already taken action in this area by providing pump-prime funding through the Sector Challenge for a number of initiatives. These include improving the provision of careers advice, supporting the work of the Careers Service, and encouraging the wider adoption of employment best practice.

There are almost 1 million **women** working in tourism-related industries in the UK.<sup>25</sup> Women now account for some 60 per cent of all employees in tourism, and just under half of the full time employees. Women make up the majority of part-time staff at around 71 per cent. Over the last five years there has been a 25 per cent increase in women working full-time in tourism, many of whom run their own small businesses.

Tourism provides entry level jobs and flexible part-time opportunities which can be attractive to women wanting to return to work after having a family. Research undertaken by the Hospitality Training Foundation also suggests that women working in hospitality stand a better chance of reaching jobs at management level than in other industries.

3.3.12 Young people need up-to-date and accurate information about what it is really like to work in today's tourism and hospitality industry. The hospitality industry, led by the BHA Council and with the support of the Employment Service and Springboard, has developed plans for a high profile, national, industry-wide careers festival and image campaign with the aims of:

C raising the profile and promoting the image of the hospitality industry;



- C encouraging more candidates to see it as a first choice career;
- C promoting all entry routes, including New Deal; and
- C influencing the "influencers", such as parents, careers advisers, colleges and employers.

3.3.13 The hospitality industry is also committed to:

- C ensuring that the Government's three year funding of the expansion of the Springboard network of advice centres nationwide is matched by an even bigger and continuing commitment from the industry, so that this valuable initiative can promote up-to-date information about jobs and careers for many years to come.

In 1997, the Hospitality Training Foundation won substantial funding under the Government's Sector Challenge competition to take forward work to raise the profile and image of the industry and help tackle the industry's skills shortages and recruitment challenges. As a result, **Springboard UK Limited** was set up to promote hospitality, tourism and leisure as a first choice career throughout the UK. *Springboard UK* aims to provide both young and older people with up-to-date information about what it is really like to work in hospitality and tourism today, and to attract high calibre people into the industry.

*Springboard UK* has now opened three 'one stop shops'. These centres provide free industry-specific careers, education and training information, advice and guidance to those seeking employment and those who influence career choices. The centres in London, Glasgow and Cardiff will soon be joined by others, either as stand alone shop windows (in Manchester and Nottingham) or within host partner organisations (all over the country).

All Springboard centres have access to a range of communications tools, including *Sprinteractive* - a unique multi-media CD ROM with information on cvs, training programmes, college and university courses, preparing for interviews, job and career profiles, etc.

### ***Encouraging best employment and management practice***

3.3.14 Some employers have adopted a best practice approach to employment and have seen the results in improved customer satisfaction and profitability. Many still have not. The Government will encourage further take up of good employment practices throughout the industry by:

- C undertaking a review of the policies on employee share ownership to encourage more employees to take a stake in their companies and to maximise the contribution of share ownership schemes to productivity. We will look at incentives for high quality managers to share the risks and rewards in running SMEs through equity based remuneration; and
- C working with trade associations, national and regional tourist boards, TECs (especially the Tourism and Leisure Network for TECs), and NTOs to improve industry coordination in promoting good employment practice.

### Case study

From the day they took over the rundown **Seaview Hotel** on the Isle of Wight, Nick and Nicky Hayward knew that the secret to success lay in delighting their customers. Rooms were carefully planned to suit a wide range of visitor needs and they selected good quality furnishings. But continued success hinges on:

- C understanding that satisfied employees are key to successful guest relations. Staff are chosen for their personality rather than paper qualifications, but are encouraged to study once they join the hotel. No one works more than 40 hours a week and all can participate in weekly planning meetings;
- C a commitment to work with the local community, using local suppliers wherever possible, providing the very freshest local produce, a distinctive local feel to the hotel, and a friendly reception throughout the village; and
- C the adoption of a business excellence quality model which actively benchmarked current performance and highlighted areas for improvement.

As a result, employee satisfaction is high, many guests revisit each year, the islanders patronise the restaurant and local businesses favour the hotel for their conferences and other events. The Seaview Hotel is one of the few small businesses to win the Business Excellence Award.

The British Hospitality Association (BHA) led ***Excellence Through People*** project, which also won funding from the Government's Sector Challenge competition, aims to encourage employers to develop good employment practices and then measure them against the best in this industry and others. Employers signing up to a Code of Good Employment Practice will receive awards, and a directory will be published and distributed to schools, careers advisers, and Employment Service advisers.

3.3.15 In addition, the Government looks to the industry to:

- C achieve wider participation in the British Hospitality Association's *Excellence Through People* initiative; and



C participate in the *Fit for the Future* campaign. Led by the CBI and supported by the Department of Trade and Industry, this campaign is aimed at raising awareness of best practice among all UK companies and encouraging its adoption to improve UK competitiveness. Working with trade associations, regional bodies and others, the emphasis will be on business learning from business.

### ***Encouraging investment in training***

3.3.16 Quality training is a pre-requisite for a professional and well-motivated workforce and *Investors in People* is the Government-backed national standard which sets a level of good practice for improving an organisation's performance through its people.

#### Case study

The Irish-based **Jurys Hotel Group** operates four hotels and three inns in Britain. The company has a strong commitment to quality (it was the first hotel group to gain the ISO 9002 quality management accreditation) and recognises that training plays a key role in delivering a quality service and ultimately impacts on the bottom line.

In 1994, Jurys decided to supplement its existing training programme by working towards *Investors in People* standard ensuring that the level of training offered to staff met with best practice. As a result, Jurys have implemented a number of new initiatives, including:

- C ensuring that all management and supervisory staff attend *Train the Trainers* courses which enable them to pass key skills on to staff under their care;
- C sending all managers and supervisors on programmes to help them understand motivation, team building and personnel appraisal processes and to ensure that these are properly implemented throughout the hotel; and
- C a development programme to introduce managers to all of the hotel's functions and provide them with opportunities to broaden their skills.

Jurys is also a committed partner in the New Deal programme. With the opening of Jurys London Inn in 1998, the company employed 32 previously unemployed staff, and has ensured that they receive ongoing training, development and support.

3.3.17 *Investors in People* is intended to help employers get the best returns from the investment in training and development that is crucial to economic competitiveness and an especially vital factor for small firms' business success. The Government intends to build on the success of the *Investors in People* initiative and take action to improve the quality and availability of training within the tourism sector by:



- C supporting the Hospitality Training Foundation (which has already received Sector Challenge funding) and the implementation of its *Investors in People* project - this aims to get 500 hospitality employers nationally to work towards the *Investors in People* standard;

The Hospitality Training Foundation is developing the ***People Skills Scoreboard***, which arose out of a recent Green Paper on lifelong learning. The scoreboard is a way of developing a system to encourage the production of clearer information about training activity and allow benchmarking of information on training investment. The project will produce tables showing the levels of investment of different tourism employers in their staff and will contribute to a series of tourism industry benchmarks which will make up the *People Skills Scoreboard*.

- C encouraging greater tourism industry involvement on the TEC National Council and on individual TEC boards; and
- C encouraging the tourism and hospitality industry to fund and support the activities of the Hospitality Training Foundation and other tourism-related NTOs.

Case study

The ***Fresh Start*** initiative is a partnership between West Country Tourist Board, the accountants Bishop Fleming and National Westminster Bank. The initiative was started five years ago with funding from the Devon and Cornwall TEC and is now self-financing. It is aimed at those considering investing in the tourism industry in the South West and provides information and advice to help them through their first year in the business. *Fresh Start* organises information workshops twice a year and also produces an information pack on the initiative which is mailed worldwide to those considering investing in South West tourism.

- 3.3.18 There are currently a number of critical skill shortages within the industry, particularly in the hospitality industry. With an ageing population, if the tourism industry is to remain vibrant and continue to grow, it will be important to change attitudes to employing older workers. To encourage this:
- C the Government, through its proposals on welfare reform, will encourage people of working age to work whenever they are capable of doing so;
  - C the Government is adopting measures that improve employability through various New Deal and area-based initiatives;
  - C employers will need to recruit from the widest possible pool of candidates and offer a wide range of flexible working arrangements;
  - C TECs will work with partners to draw up local plans for workforce development - these plans will link in with the strategies for skills development currently being considered by RDAs;
  - C National Training Organisations (NTOs), trade bodies, educational institutions and individual tourism businesses will help the industry contribute to national skills targets; and
  - C the Government will work with NTOs on the *Skills Foresight Programme* to predict future skill needs, agree achievement of sector targets, and develop action plans which contribute towards the achievement of National Learning targets.

The Hotel and Catering International Management Association (HCIMA) and the BHA are undertaking a joint initiative to promote high standards of service excellence. They have formed a strategic alliance with Investors in People UK to support the quality of people management and customer service in the hotel and catering sector.

Known as ***Hospitality Assured***, this standard - the first to be developed in the hospitality industry worldwide - is based on the concept of best practice. It comprises a definitive professional service standard, which measures the effectiveness of an organisation's internal customer service processes and customer satisfaction standard, designed to establish customers' views on the standard of service being provided.

Following its launch in mid 1998, seven organisations are now accredited *Hospitality Assured*, and over 20 more have given their firm commitment to achieving accreditation in the first six months of 1999. The HCIMA has recently won an award of £40,000 from the Savoy Educational Trust to help begin the task of introducing *Hospitality Assured* to small and medium-sized hospitality businesses.

### ***Enhancing industry coordination on training***

3.3.19 For tourism companies, high staff turnover represents a considerable waste of resources and often has implications for product quality. It is often related to relatively low salaries and low productivity. A motivated and well-trained work force tends to enhance productivity, thus reducing operating costs. It is in the interests of the industry to coordinate training initiatives so that skills are transferable throughout the sector. To encourage such action:

- C we will encourage companies to include human resource output measures in their annual reports, such as percentages of employees who have achieved NVQs at each level, levels of labour turnover or staff retention, and how they stand in relation to National Learning Targets;
- C NTOs will develop and coordinate education and training solutions for their sectors; and
- C the NTOs National Council, the TEC National Council, and Business Links will improve industry coordination on training to ensure that training products are

of high quality, and lead to quantifiable business outcomes, with a stronger emphasis on transferable skills.

#### Case study

Established in 1995, the **Butlers Wharf Chef School** in London focuses on the acquisition of real skills and experience. The School has an award-winning restaurant, *The Apprentice*, and has won three national awards for its achievements in training and development.

An industry-led steering group is now exploring the feasibility of establishing a **hotel school** along similar lines to Butlers Wharf.



## 4 ENCOURAGING THE WISE GROWTH OF TOURISM

A “wise” growth strategy for tourism is one which integrates the economic, social and environmental implications of tourism and which spreads the benefits throughout society as widely as possible.

4.0.1 The Government's vision for sustainable development is based on four broad objectives:

- c social progress which recognises the needs of everyone;
- c effective protection of the environment;
- c prudent use of natural resources; and
- c maintenance of high and stable levels of economic growth and employment.

4.0.2 Tourism is one of the most successful sectors of the economy and can make a significant contribution to achieving these objectives. The economic, social and environmental opportunities associated with tourism, however, will only be sustained if we take care of the fabric on which tourism depends - our unique environment, heritage, culture and the diversity of our landscape and local communities.

4.0.3 The Government also recognises that the benefits of tourism will only reach the whole of society if efforts are made to broaden access to tourism opportunities to all. A “wise” growth strategy for tourism, therefore, is one which integrates the economic, social and environmental implications of tourism and which spreads the benefits throughout society as widely as possible.

4.0.4 This chapter therefore examines what needs to be done to:

- c develop and promote a sustainable approach (section 4.1)
- c increase access to tourism for all (section 4.2).

## 4.1 Developing and promoting a sustainable approach

4.1.1 In 1998 the Government launched a major consultation exercise - *Opportunities for Change* - on sustainable development in the UK. Tourism formed a part of that exercise and a supplementary consultation paper, *Tourism - Towards Sustainability*, was distributed to a wide range of organisations with an interest in tourism. It asked for ideas on action to be taken to help tourism move towards a more sustainable future.

4.1.2 In developing this strategy, the Government has taken account of the responses to that consultation, as well as considering previous work published by Government and other agencies - see Annex 3 for a bibliography. A full analysis of the responses to *Tourism - Towards Sustainability* (which is at Annex 4) suggested action was needed on six different fronts to:

- C establish an effective **policy framework**;
- C maximise tourism's potential to benefit **local communities**;
- C manage **visitor flows**;
- C address the **transport** issues associated with tourism;
- C address the **planning** issues associated with tourism; and
- C build **partnerships** between public, private and voluntary sectors.

**Agenda 21** is a comprehensive programme of action adopted by 182 governments at the United Nations Conference on Environment and Development, the Earth Summit, in June 1992. The first document of its kind to achieve international consensus, Agenda 21 provides a blueprint for securing the sustainable future of the planet, from now into the 21st Century. The Earth Summit identified tourism as a key industry with the potential to help in the transition to sustainable development.

Agenda 21 recognises that sustainable development can only be achieved if we consciously examine and seek consensus on the path we need to follow - and then act together to make sure it is implemented. **Local Agenda 21** is the means by which Agenda 21 is developed and actioned at local level, through local authorities. Local Agenda 21 emphasises that sustainable development is a collective process, including all sections of society.

*"I want all local authorities in the UK to adopt Local Agenda 21 strategies by the year 2000."* Tony Blair, UN General Assembly Special Session on the Environment, June 1997.

### ***Establishing an effective policy framework***

4.1.3 The 1998 consultation identified a need for Government to take a lead by promoting the adoption of sustainable development principles based on Agenda 21 in all tourism strategies, whether at national, regional or local level. To provide such a lead we will:

(i) *Nationally*

C give the new tourism body for England lead responsibility for developing sustainable tourism in the domestic market; ensure that it works closely with bodies such as the Countryside Agency, English Nature, English Heritage and the National Trust; give clear directions on the areas where action is to be taken and ensure that these contribute towards the achievement of the Government's new Sustainable Development Strategy; and require the Chairman of the new tourism body to report annually on progress in achieving more sustainable forms of tourism to the Secretary of State for Culture, Media and Sport;

C ask both the BTA and the new tourism body for England to produce sustainable tourism strategies which will help guide their own future activities;

- C ask the new tourism body for England to ensure that the Tourism Forum includes people with expertise in sustainability and ask the Forum annually to assess the extent to which the tourism industry in England meets the principles of Agenda 21 and make recommendations on how policy should develop to achieve this;



- C ensure that the contribution tourism can make to the economy, the environment and to improving the quality of life for those who live and work in our cities and countryside is taken into account in the Government's forthcoming Urban and Rural Policy White Papers;
- C develop a series of national statistical indicators to help us measure progress in achieving sustainable tourism. The development of national indicators will be supplemented by the publication in association with the British Resorts Association of guidance on the development of compatible local indicators for sustainable tourism;

**Green Globe** is an environmental management programme for travel and tourism companies and destinations. Its worldwide membership, in over 100 countries, is dedicated to improving environmental practices and to increasing environmental awareness within the industry. Developed in 1994 by the World Travel and Tourism Council as a direct response to Agenda 21, the initiative has the support of over 20 international industry associations.

The programme is supported by packages designed to help staff at all levels bring about environmental improvements. It is open to companies of any size, type and location that are committed to improvements in environmental practice. *Green Globe's* primary objective is to provide a low-cost, practical means for companies to commit to improvements in environmental practice based on international guidelines and best practice. *Green Globe* also provides a vital link with destination management concepts at a local level. A growing number of destinations are working with private sector companies to ensure that essential development which brings wealth and jobs to the community occurs in a sustainable fashion.

(ii) *Regionally*

- C look to the new RDAs to ensure that their regional strategies take full account of the principles of sustainable development;

- C work with the regional offices of the Countryside Agency, English Nature and English Heritage to develop sustainable regional policies;
  - C encourage incorporation of sustainable development principles in the strategies of RTBs, with RTBs acting as champions for sustainability in their region and working with the new Regional Cultural Consortia to integrate tourism issues into cultural strategies;
- (iii) *Locally*
- C promote the inclusion of sustainable tourism considerations in Local Agenda 21 strategies and where Agenda 21 projects do not exist, we will encourage local authorities to use tourism as a focal point for their development; and
  - C encourage the adoption of existing guidance on sustainable development, such as *Agenda 21 for the Travel and Tourism Industry*, and work with organisations such as the Local Government Management Board (to become the Improvement and Development Agency from April 1999) on the production of guidance on sustainable tourism for Local Agenda 21 groups.

## Case study

**New Forest District Council** has developed *Our Future Together*, a programme to make the area one where the visitor, the tourism industry, the community and the environment are in complete harmony.

One of the programme's initiatives aims to help local tourism businesses gain the economic, social and marketing benefits associated with good environmental practice. A partnership between the Council's Local Agenda 21 group and the New Forest Tourism Association, this initiative will publish a LA21 toolkit which is based on the *Green Audit Kit* - see page 70. The toolkit includes best practice examples from across the region and fact sheets which help businesses identify simple and immediate environmental improvements. Uniquely, the toolkit also includes a range of indicators, targets and benchmarks, which the industry should seek to achieve over time, and a process for monitoring performance. Targets are easily measurable, such as the introduction of energy efficient lighting throughout 20 per cent of the property each year. Companies are also encouraged to participate in the destination's tourism research and "car free" projects, which are key components of the kit and are fundamental to improving the quality of the tourism experience.

Progress will be assessed via regular updates and reviews. New priorities will also be established to take the programme forward. The scheme will be supported by marketing initiatives (depicted by the *Little Acorn* logo) to reward businesses that implement it effectively.

### ***Maximising tourism's potential to benefit local communities***

4.1.4 Tourism has tremendous potential to benefit local communities, especially in areas where traditional industries or agriculture are in decline. It can contribute to the regeneration of urban and rural areas; to the preservation and re-use of existing resources (such as historic buildings); to the protection and enhancement of the local environment; and to maintaining the economic viability of local businesses (through diversification such as farm tourism).

#### Case study

The Crocker family, which owns **Trevigue Farm** in Cornwall, has vastly increased the range of activities, based on tourism, which contribute to its farm business. Farm buildings have been converted to self-catering accommodation and sit alongside a long-established bed and breakfast business. A barn serves as a tea room and function suite and the farm is licensed to conduct marriage ceremonies.

Much of the farm is managed so as to conserve and enhance nature. With the introduction of moorland ponies and South Devon suckler cows, flowers that have not been seen for years have reappeared, and there are plans to reintroduce the chough, Cornwall's national bird, not seen in the county since 1975.

4.1.5 To maximise the potential of tourism to benefit local communities and raise awareness of those benefits, the new national tourism body and the RTBs will:

(i) *Spreading benefits*

- C encourage tourism businesses to source and promote the use of local goods (e.g. regional beers and speciality foods) and services, employ local people and offer discounts to encourage residents to use facilities provided for tourists;
- C encourage tourism management partnerships between local authorities, tourism operators and local communities so that tourism strategies are developed to benefit both residents and visitors;
- C review existing incentive schemes available for tourism to ensure they incorporate sustainable development in their selection criteria, and identify other incentive schemes to promote sustainable practices or environmental protection which could be extended to include tourism;
- C promote the development and uptake of visitor payback schemes to encourage tourists or businesses to contribute (financially or in kind) to local environmental protection and enhancement programmes; and

(ii) *Raising awareness of tourism's benefits*

- C use regional and local tourism strategies to raise awareness in communities of the potential for tourism to create employment opportunities and provide resources for economic, social, cultural and environmental enhancement.

#### Case study

The **Lake District Tourism and Conservation Partnership** demonstrates how tourism can underpin the conservation of our environment. In agreement with public, private and voluntary organisations involved in tourism, the Partnership developed the first effective large scale visitor payback scheme in England.

The initial scheme was created in partnership with three local self-catering agencies, who asked tourists if they would donate an extra £1, matched by 50 pence from the agency, on top of the cost of their holiday. The proceeds (£8,500 annually) help to pay for a National Trust footpath repair worker, known as *Our Man at the Top*.

The visitor payback scheme is now being adopted by other tourism businesses. The partnership introduces levies with the full support of tourism agencies and ensures that all publicity material carries information to help tourists understand where and how their money is being spent to conserve the Lake District environment.



#### Case study

Purbeck in Dorset, is one of the most easily accessible and heavily used stretches of our coastline, receiving some 4.5 million visitors each year. By the early 1990s, visitor pressures were intense and the local community began to react negatively to increased tourism growth. Congestion and over-crowding also impacted on the quality of the visitor experience.

Purbeck District Council's response was to develop a management plan to promote more sustainable forms of tourism. Rather than creating the plan independently of other stakeholders, the Council established the **Purbeck Heritage Committee** (comprising environmental groups, the RTB, the National Farmers Union and district and county councils) and the **Purbeck Forum** (which includes representatives from a wider range of bodies involved in developing and managing the Purbeck area) to help develop and coordinate the management plan.

As a result, all sectors are actively engaged in implementing the plan. This sense of ownership lies at the core of the area's success and programmes are now being implemented to address: the large number of visitors within the area; the resulting transport-related pollution; the need to repair and clearly differentiate footpaths; and residents' concerns about the impact of tourism.

#### *Managing visitor flows*

4.1.6 Well-managed tourism can underpin economic activity, supporting services and generating revenue. The movement of visitors does need appropriate management, particularly in those areas which attract large numbers of visitors. One of the problems associated with tourism is the effect of large numbers of visitors on an area. Too many people in one place at the same time can damage the local environment, alienate the local community and reduce the quality of experience for visitors.

#### Case study

The Peak District receives over 22 million visitors each year and is one of the most popular and accessible areas of countryside in England. The **Peak Tourism Partnership** was a three year pilot project established in 1992 to bring together national agencies and local interests to explore new approaches to managing visitors and tourism in the Peak District.

The project was successful in moving visitor management up the agenda, involving local communities in the planning and implementation of projects, and in developing new approaches to raising money from visitors. Initiatives which were carried forward included two visitor management plans, six local interpretation plans and a pilot trust to advance the visitor payback concept.

The **Peak Environment Fund** came out of this project as an innovative approach to raising voluntary contributions from visitors and local businesses to fund conservation and visitor management projects within the Peak District. Schemes already in operation include: the collection of funds from 11 car parks, collections by 45 tourism businesses, 6 businesses who contribute a percentage of their entrance charge, and an annual 'Pound for the Peak' appeal week. The Fund has given grants to a number of projects, including erosion protection at Mam Tor hill fort and footpath restoration in Dovedale.

4.1.7 Attractions which have introduced positive visitor management schemes, however, show that it is possible to increase the capacity of destinations, protect the environment and offer rewarding experiences to guests and local residents. Our aim, therefore, is to promote the better management of visitors at local level in order to spread the benefits of tourism more equally, whilst minimising the negative impacts. The new national tourism body and the RTBs will:

- C promote the development of effective visitor management plans which implement techniques such as: market segmentation, advance booking mechanisms, combined ticketing initiatives, carefully designed interpretative walks, the promotion of alternative holiday opportunities, and effective sign posting to direct tourists within and around heavily utilised sites;
- C promote the introduction of locally agreed schemes to alleviate pressure in areas experiencing high tourist pressures by encouraging visitors to less popular areas, preferably those which have good access by public transport; and

- c DCMS will co-fund the setting up of a National Sustainable Travel and Tourism Website which will provide a central point of access to information and resources on best practice on, among other things, visitor management techniques. We will then ask the Tourist Boards to promote the Website.

***Addressing the transport issues associated with tourism***

- 4.1.8 Tourism involves travelling to and around a destination and transport has a major impact on the environment (through the emissions, noise and visual intrusion associated with most motorised transport). The White Paper on Integrated Transport Policy sets out a package of measures to create a safe, efficient, clean and fair transport system, and provide a more strategic approach. The aim is to make it easier for people to reach more informed decisions about their travel choices, and to understand how changes in travel behaviour which are good for the environment can also benefit us all.

The White Paper on **Integrated Transport Policy** sets out a wide range of measures to improve travel by public transport, including:

- C establishing *Quality Partnerships* between local authorities and bus operators which will lead to quicker, more reliable services, use higher quality vehicles, offer greater timetable stability, and provide better interchanges and connections - *Quality Partnerships* may also require bus operators to improve the quality of bus services through improved staff training;
- C giving local authorities powers to require public transport operators to promote and participate in joint ticketing and Travelcard schemes;
- C proposed powers allowing local authorities to impose road user charges to tackle congestion and spread the load from more congested roads - the proceeds from such schemes must be reinvested in transport improvements;
- C asking local authorities to make places safer and more attractive for walking;
- C continuing to help with the development of the National Cycle Network;
- C working with local authorities, transport operators, the police and motoring and other organisations on specific measures to reduce fears about personal security on transport.

Other Government agencies (e.g. the Highways Agency) have produced guidance to help local authorities adapt to changing transport requirements. Their new "toolkit" includes measures to manage demand on the road network and to give priority to coaches, buses and lorries where appropriate.

4.1.9 In support of the measures contained in the White Paper, the Government will:

- C improve the quality and accessibility of information available to tourists about travel choices by: working in partnership with local authorities and operators to develop a national, integrated public transport information service by 2000; promoting integrated timetabling between modes; providing accessible and intelligent integrated transport maps; and encouraging the tourism industry to include information about public transport links and alternative transport modes in brochures and other marketing materials;

- C examine the potential for delivering integrated public transport and tourist information to tourists in a user-friendly way, through electronic or other means - a pilot project will soon commence;
- C encourage tourist and leisure site managers to produce green transport plans to reduce congestion and pollution from employee and visitor car traffic to tourist sites and encourage a switch away from car use to less polluting forms of transport - we will produce guidance on best practice to help in the development of such plans;
- C encourage the upgrading of public transport infrastructure to accommodate leisure capacity, for example by providing facilities for bicycle carriage, cycle parking and improving the frequency of weekend services;
- C identify and publicise schemes, for example on the National Sustainable Travel and Tourism Website, which utilise transport or visitor management techniques to good effect, for example, park and ride, integrated ticketing schemes, discounts or other incentives at attractions for those arriving by public transport, and free or reduced price local bus or train services; and
- C encourage the creation of new tourism products which integrate walking with cycling or travel by bus and rail as part of the experience and which cater for all passengers, including people with young children.

#### Case study

The **North York Moors National Park** has developed some innovative solutions to the transport issues associated with increased tourist pressures. The National Park has a statutory duty to balance conservation and recreational uses within a living landscape. This balance is not easy to achieve, but an integrated public transport network can help to reduce car-related pressures and provide a new service for residents as well as visitors. In the North York Moors, the transport service has two core components:

- C a *Moorsbus* recreational transport network, which provides comfortable, cheap and reliable public transport, reducing the impact of the car on the national park and improving access for all regardless of wealth or mobility;
- C the Esk Valley rail project, which encourages recreational, community and business use of a local railway line and provides access to some of the most attractive scenery in the National Park. Integration of timetables and ticketing between the railway line and *Moorsbus* network has encouraged visitors and residents to make more journeys combining modes of transport - use has increased by 30 per cent in the last year.

4.1.10 In addition, the Government recognises the need to address the consequences of increased demand for air travel both among those who wish to visit and those who wish to travel around the UK. It also wishes to make it easier for parts of the country which are less well-served by aviation to attract tourism. The Government therefore wishes to encourage growth of regional airports to meet local demand for air travel, where that is consistent with sustainable development principles, and to maximise the contribution that those airports make to local economies. To this end, we will:

- C prepare a UK airports policy looking some 30 years ahead and reflecting the Government's policies on sustainable development and integrated transport networks. We will consult widely in preparing this document.

#### ***Addressing the planning issues associated with tourism***

4.1.11 Tourism worldwide is predicted to grow over the next century. There may be short-term fluctuations in this trend but the overall pattern is for increasing volumes of visitors. The UK is unlikely to be an exception. Marked increases in visitors will require existing infrastructure such as hotels, shops, restaurants

and transport links to be replaced and augmented. Where this new infrastructure is located and how it is designed will play a crucial role in determining the long-term sustainability of the industry.

4.1.12 Our aim is to ensure that new tourism development is more sustainable by ensuring that it: is located on public transport routes; offers pedestrian and cycle access; is linked to other infrastructure (for example, hotels and restaurants); is aesthetically attractive; is in keeping with the quality of building and identity of the area; and causes the minimum of environmental damage during construction, adaptation and operation.

4.1.13 If we are to reap the benefits tourism can bring to local communities, and encourage development that is sustainable and enhances rather than detracts from the local environment, then we need to ensure that there is dialogue between planners and developers. Planners need to be aware of the benefits of tourism and of the potential of well-planned tourism developments to bring substantial economic, employment and social benefits to local communities. Equally, developers often find the system of building regulation confusing. They need to improve their understanding of the tasks of planners, building inspectors and those involved in maintaining the heritage, so as to encourage sympathetic, well-designed developments that enhance the local environment.

The Government has sought to promote a greater balance between the needs of conservation and development in a range of ways:

- C the National Planning Forum's guidance, *Planning for Tourism*, provides best practice examples of sustainable tourism initiatives;
- C *Planning for Sustainable Development: Towards Better Practice* is the first good practice guide to be published on sustainable planning;
- C *Good Practice Guidance on Design in the Planning System* is shortly to be published; and
- C the Government has launched the *Modernising Planning* initiative to speed up and improve the planning system at the national, regional and local level. As part of this, we will publish a consultation document on what can be done to speed up decision making on major infrastructure projects, such as Heathrow's Terminal 5.

The Government is now researching how **planning policy** guidance for England can best facilitate leisure and tourism developments whilst achieving more sustainable patterns of development and travel. The research will be completed in the course of this year.

4.1.12 The Government has also been focusing specifically on the interaction of leisure and tourism developments with the planning system and has commissioned research looking at, for example:

- C whether planning authorities should be more proactive in recognising the role of tourism in urban and rural regeneration;
- C how to plan more effectively for large scale tourism development; and
- C whether developers of leisure facilities can be more actively engaged in the plan making process.

4.1.14 The Structural Funds provided by the European Union are an important resource for new tourism development in the regions. The Government Offices for the Regions and the RDAs will work together to ensure that the principles of sustainable tourism are taken into account when advising on applications for European and other public funding for tourism development.



### ***Building partnerships between the public, private and voluntary sectors***

4.1.15 Sustainable tourism will be most easily achieved when consumers demand more sustainable products and businesses understand the benefits of providing such products. To raise awareness among consumers and businesses of the benefits of adopting a sustainable approach, the new national tourism body and the RTBs will:

(i) *Businesses*

C promote better understanding among operators of the business benefits available from programmes to reduce energy consumption (especially those developed by the Building Research Establishment), waste production and water use;

The **Building Research Establishment** (BRE) publishes practical guidance to help the hospitality and leisure industries reduce energy consumption and associated carbon dioxide emissions. Their technical guidance is supported by a wide range of practical initiatives which include: demonstration projects, training seminars for hotel associations, the publication of training materials for hotel schools, the provision of consultancy advice for specific hotels, the operation of a design advice centre for new hotels, and a wide range of seminars on specific issues to help the hospitality industry implement effective energy saving programmes and contribute to the more sustainable development of tourism. In total, the programme will have helped the British hospitality industry to achieve annual energy savings of £30 million by 2000.

In taking the programme into the 21st Century, BRE is planning to launch an exciting new programme to develop practical partnerships with hospitality companies and actively work with them to reduce energy consumption still further. It is estimated that this programme can reduce total energy consumption within the industry by around one-fifth, thus making a significant contribution to the Government's commitment to cutting emissions of carbon dioxide.

C ensure that through the National Sustainable Travel and Tourism Website businesses have access to advice about sustainable tourism issues, focusing on areas of specific need, such as small and medium enterprises;

Founded in 1992 by a consortium of ten multinational hotel groups, the **International Hotels Environment Initiative** (IHEI) is an educational charity which aims to encourage continuous improvement in the environmental performance of the hotel industry.

IHEI also works in partnership with the BHA to enable small and medium size hotels in the UK to successfully address environmental issues and is a catalyst and a conduit for hotels to pool their resources and share their environmental improvement successes via a non-competitive platform.

- C work with the NTOs for tourism to ensure that sustainable tourism issues are integrated into formal and informal training programmes for students of tourism and employees receiving vocational training;

The **Green Audit Kit** was developed from a joint pilot initiative between the Countryside Commission and the Rural Development Commission. It was produced by the RDC in 1996 as a self-help guide for tourism enterprises to improve their business performance while becoming more aware of their environmental and social responsibility. The Regional Tourist Boards have acted as the main distribution channel for encouraging tourism businesses to use the Kit. A recent independent evaluation highlighted the potential business benefits to users of the Kit. The RDC and West Country Tourist Board are currently working together to develop new pilot initiatives such as Internet promotion, award schemes for tourism enterprises and specialist advice to users of the Kit.

(ii) *Consumers*

- C encourage local authorities and tourism businesses to communicate environmental and sustainable tourism issues to visitors through brochures, ticket wallets, in-destination and other marketing and promotional material; and
- C work with the Sustainable Development Education Panel, which is developing a strategy for sustainable development education in England to ensure that it embraces tourism within its scope so that the consumers of tomorrow understand the issues and the need for action.

## 4.2 Increasing access to tourism for all

4.2.1 Over the last decade, tourism opportunities have extended to more people than ever but still, in any one year, some 40 per cent of the population do not take a holiday of longer than three days.<sup>26</sup> This is often not out of choice - people may be prevented from holiday taking by disability, family, health or cost reasons. It is estimated that some 4 million disabled people in Britain wish to travel for tourism purposes but many currently do not do so.<sup>27</sup> The Government is determined to help people - the elderly, people with disabilities, single parent families, families with young children, carers, and people with low incomes - who find difficulty in taking holidays or leisure breaks. The priorities are to:

- C highlight growing market opportunities;
- C make English tourism the most accessible and welcoming in Europe;
- C widen access to tourism opportunities;
- C improve access to employment in tourism; and
- C widen access to our culture, heritage and countryside.

### ***Highlighting growing market opportunities***

4.2.2 There are likely to be significant market opportunities for those who are able to respond to the changing needs and structure of society over the next decade. In ten years time, there will be over a million more people in Britain over the age of 60 than there are today.<sup>28</sup> Changes in the demographic and lifestyle characteristics of the population mean that many of these groups represent considerable, and as yet largely untapped, market opportunities in their own right because of their significant volume and growth potential.

4.2.3 To ensure the industry benefits from the future market opportunities associated with some sectors of society, and that it plays a role in achieving our broader objectives for welfare reform, the new national tourism body for England will:

- C undertake further research among those who do not currently take holidays to identify: total market potential; special needs in terms of facility, transport

design and promotional materials; and the level of training required to ensure that tourism businesses are able to meet the needs of these groups; and

- c advise the industry on the scope for creating products to exploit hitherto untapped market opportunities.

Public, private and voluntary sectors have all developed innovative products to meet the needs of these groups. For example, the **Tourism for All** campaign was established in 1989 by the ETB and the Holiday Care Service to create a genuinely accessible travel and holiday environment for everyone, regardless of age or ability.

The Holiday Care Service, which handles more than 30,000 information requests annually, and the Tourism for All Consortium are the main organisations promoting tourism for people with disabilities. The Consortium is keen to raise the profile of National Accessible Standards among consumers and operators. A leaflet has been issued encouraging people to look for the symbol when booking accommodation.

The Family Holiday Association, Gingerbread and the Round Table have also been active in providing holidays for children from under-privileged backgrounds.

### ***Make English tourism the most accessible and welcoming in Europe***

- 4.2.4 While some tourism businesses have been quick to spot new market opportunities, overall progress has been slow. This is largely a result of a lack of awareness, prejudice against some sectors of society, a lack of training to cope with the needs of specific groups, and the employment practices of the industry (for example, towards disabled people, elderly people or single parents).

#### Case study

Since its establishment in the 1920s, **Drusillas Park** has appealed to the widest possible range of visitors and has done much to achieve its vision to "be recognised as the best small zoo in Europe."

The Park has adopted a range of child-friendly policies, including a pricing structure with discounts to family groups and free entry for very young children. To ensure they keep in touch with their most important customers - children - the Park's owners established a Junior Board, comprising children aged nine to thirteen, which plays an active role in management decisions. The Board made headlines with a Children's International Summit on the Environment and has upgraded the Park's sensory trail, to provide a sound, sense and touch tour for the visually impaired.

Access and equality of opportunity are equally important and priority is placed on enabling easy physical access for all. Nearly all attractions are on one level and, where there is a change of level, ramps are provided. The rear carriage of the park's train has been adapted to accommodate wheelchairs. Equality of opportunity extends beyond guests - the Park's employment policy aims to take account of all sectors of society. A new priority is to encourage the employment of mature, skilled people.

4.2.5 To ensure further progress is made:

- C the Government will encourage the adoption of more family friendly policies, for example, the provision of baby changing equipment in hotel rooms, multiple entry tickets to attractions, and activity clubs for teenagers at holiday parks;
- C the new national tourism body for England will promote initiatives, such as the Tourism for All Consortium, which seek to train those within the tourism industry and promote good practice;
- C the Government will work with trade associations, major tourism and leisure groups, local authorities and tourist boards to develop a national campaign which aims to change public attitudes to disability;
- C organisations will be encouraged to incorporate disability awareness and training as an integral element of all hospitality and tourism courses;

- C architectural colleges will be encouraged to ensure that course curricula include an emphasis on making provision for disabled access within building design.

The Family Holiday Association (FHA), the national charity specialising in the provision of holidays to low income families with children, launched the ***Time to Care*** appeal in 1997. The aim is to raise £1 million to provide a holiday in the year 2000 for every child in local authority residential care. A number of major tourism companies have pledged cash donations or have offered free holidays, and the appeal has been adopted as the ABTA President's charity project.

14.1 million people and 4.6 million children live on less than 50 per cent of average income<sup>29</sup> - a huge, largely untapped market. The FHA has therefore been working with the LGA with a view to researching local authority activity to aid "social tourism".

### ***Widening access to tourism opportunities***

4.2.6 The Disability Discrimination Act 1995 was designed to protect disabled people from discrimination in employment and to increase access to goods, facilities and services. The Act's employment provisions and the duty on service providers not to treat disabled people less favourably have been in force since December 1996. From October 1999, service providers will have to make "reasonable adjustments" for disabled people. From 2004, they will have to consider making alterations to the built environment.

4.2.7 This legislation has the potential to make a significant contribution to widening tourism opportunities throughout society. In addition, the education of tourists and tourism employees, enhanced understanding of market potential, and communication of the specific needs of those people who have less opportunity to travel will all play an important role in achieving our commitment. To address these issues:

- C the Holiday Care Service will work in partnership with tourism companies, local authorities and trade associations to provide information in a form which is suitable for those who have less access to traditional information dissemination modes (for example: large type, talking timetables, Braille); and

- C the Historic House Association (HHA) has launched a Disabled Visitors Fund to distribute money and equipment to open houses which belong to HHA members so that people can visit and enjoy them. The first recipients of the

fund were Forde Abbey in Somerset, which was provided with a buggy for use by disabled visitors, and Mapperton in Dorset, which was provided with new ramps.

4.2.8 The Government wishes to see more facilities offering easy access to those who have mobility difficulties. The Government is introducing regulations to require new transport vehicles to be accessible to disabled people. Regulations covering new rail vehicles are already in place. In addition, we look to the trade associations representing the accommodation, attractions, restaurants, licensed retailing, catering, transport, entertainment and events sectors to:

- C encourage the adoption of voluntary agreements with disability groups, such as Welcome All, and implement the National Accessibility Standards; and
- C establish an advisory service for their members on access issues - we recommend that this advisory service includes a register of qualified access consultants and establishes a body of best practice.

#### ***Improving access to employment in tourism***

4.2.9 The Government aims to improve access to employment opportunities for all sectors of society, and will:

- C encourage trade associations to work with disability groups to develop training and information programmes which raise awareness of the potential of these groups, identify their specific needs as employees, and seek to overcome prejudice; and
- C encourage tourism employers to adopt equal opportunities policies to recruit from the widest possible range of employees, including: older people, disabled people, women wanting to return to work, those from lower income groups, and those from different ethnic backgrounds; and
- C encourage larger companies, in particular, to provide transport for employees when they are located in areas which are inaccessible to public transport.

As part of its *Service for All* initiative, the Hoteliers Forum has published ***IndividuALL***, a simple training publication which seeks to encourage employees to recognise the value of working alongside people with disabilities. The publication also identifies the needs of customers who have a disability or infirmity, provides guidance for employees to meet these needs, and has an action plan to enable hoteliers to develop equal access in their hotels.

### ***Widening access to our culture, heritage and countryside***

4.2.10 One of our principal aims is to make our culture and heritage accessible to all. Accordingly:

- C the Government is providing an extra £99 million over the next three years to national museums and galleries in England. This will: ensure that museums which do not currently charge for admission can stay free; enable national museums in England which currently charge to introduce free entry for children in 1999-2000 and for pensioners in 2000-01; and enable those national museums in England that wish to offer universal free access in 2001-02 to do so;
- C the Heritage Lottery Fund (HLF) has established a £7 million museums and galleries access fund to encourage wider access to all museums - the first awards have already been made;
- C the HLF is focusing efforts on education and access to build wider appreciation of the historic environment. New technologies are being harnessed to reach out to new audiences and excite children's interest early in life;
- C the Government is providing the Arts Council of England with an additional £124 million over the next three years, which it will use to increase access to the arts across the whole of the country - this will be a step-increase in artistic activity, not just in the cultural centres like London but in all the regions of England;
- C arts organisations across the UK will be encouraged to attract new audiences to the arts - through targeted programmes to encourage people to try out artistic experiences for the first time, and by making arts more available.

4.2.11 The Government is also committed to encouraging access to the countryside and the new Countryside Agency will have an additional £2 million for this purpose in 1999-2000. The Government will also shortly announce how it will



take forward the manifesto commitment to give greater freedom for people to explore our open countryside.

## 5 MONITORING PROGRESS

The Government's report, together with that of the new national body and the Tourism Forum, will be considered at a Tourism Summit at which Ministers from a number of Government Departments and senior figures from tourism will review progress made in implementing the strategy.

- 5.0.1 Our approach in developing this strategy has been to tackle the key issues in a structured, coherent manner. It is now important for the strategy to be implemented in an equally structured and coherent way.
- 5.0.2 In outlining the main actions required, we have been careful to clarify which body or bodies will need to carry out each action, and we now expect those bodies to give priority to their implementation.
- 5.0.3 The Government will review, and report annually on, the progress made by national, regional and local government. The actions in this strategy for the BTA and the new national tourism body for England will form key elements of their new, three year Funding Agreements. Those agreements will allow the Government formally to tie funding to delivery of outputs, and allow the Government and the respective bodies to report each year on progress made in pursuing objectives. The BTA funding agreement will be signed by the end of March. The funding agreement for the new national tourism body for England will be signed early in the next financial year, once Ministers have considered the report of the implementation team (see page 14). The agreements will be available to the public.
- 5.0.4 The new national tourism body for England will have a further role: working in conjunction with the Tourism Forum, it will report annually on progress made by regional tourist boards, other agencies and by the tourism industry itself.

### 5.1 The Tourism Summit

- 5.1.1 The Government's report, together with that of the new national body and the Tourism Forum, will be considered at a *Tourism Summit*, at which Ministers from a number of Government departments and senior figures from tourism will review progress made in implementing the strategy and will agree on future action to assist the development of tourism.
- 5.1.2 The first Tourism Summit will be held in 2000 and further Summits will be held at intervals agreed by Summit members until, in the Summit's view, its purpose

is completed. In order to monitor progress and prepare for the Tourism Summit, there will be ongoing work across Whitehall and with the industry through the Tourism Forum. The Government will publish a report within three months of each Tourism Summit setting out its conclusions on progress to date and detailed recommendations for the future.

## ANNEX 1. THE TOURISM FORUM

The **Tourism Forum** was a 57 member body, with representatives from a range of organisations involved in tourism and related areas. Through Working Groups, 165 people examined: human resources; communications strategy for the industry; business tourism; widening access to tourism; visitor attractions; and domestic tourism, with sub-groups covering *sustainability*, *quality* and *distribution*. A strategic planning working group (SPWG), chaired by Chris Smith, met throughout 1998.

<u>Tourism Forum</u>	Michael Elliott *, Heart of England Tourist Board	Steven Freudmann, ABTA
Peter Agar, CBI	Peter Ford, London Transport	Peter Hampson, British Resorts Association
Pam Alexander, English Heritage	* member of SPWG	David Harbourne, formerly the Hospitality Training Foundation
Charles Allen *, Granada Group		Nicola Hayward, Seaview Hotel
Robert Ayling, British Airways		Sir Denys Henderson, Rank Organisation
Brian Barrett, Virgin Rail Group		Michael Hirst *, Joint Hospitality Industry Congress
Tim Bartlett, ETB		Gulshan Jaffer, Hotel La Place
David Beeton, Historic Royal Palaces		John Jarvis, BTA Board member
Bill Breakell, North Yorks Moors National Park		Michael Jolly *, Tussauds Group
Alan Britten, BTA Board member		Conrad Lashley, Council For Hospitality Management Education
Lewis Bronze, Bronze Productions		John Lee *, Association of Leading Visitor Attractions
Brendan Burns, Federation of Small Businesses		Geoffrey Lipman *, World Travel and Tourism Council
Peter Chappelow, ETB Board member		Jeremy Logie *, British Hospitality Association
Margaret Clark, Rural Development Commission		David Lunn, ETB Board member
Donna Covey, Britain's General Union		Ken Male, Bournemouth Tourism
Gary Crossley, Caterer and Hotelkeeper		Tim Mason, Museums and Galleries Commission
Graham Devlin, Arts Council of England		Patrick McKenna, BTA Board member
Martin Drury, National Trust		

Peter Moore \*, Center Parcs  
Stephen Moss, Springboard UK

Dorothy Naylor, North West  
Tourist Board  
  
Eve Pollard, ETB Board member  
  
John Price \*, Local Government  
Association  
  
David Quarmby \*, BTA & ETB  
  
Rupert Rhymes, Theratrical  
Management Association  
  
Ken Robinson \*, Tourism Society  
  
Jennifer Robson, ETB Board  
member  
  
Anthony Sell, BTA  
  
James Spencer, British Holiday and  
Home Parks Association  
  
Phil Swann, Local Government  
Association  
  
Bob Taylor, Tourism For All  
Consortium  
  
David Thomas, Whitbread  
  
Richard Tobias, British Incoming  
Tour Operators Association  
  
Akbar Verjee, Oki Hotel  
  
Richard Wakeford, Countryside  
Commission  
  
Howard Wells, UK Sports Council  
  
Des Wilson, BAA  
  
David Wood, Hotel and Catering  
International Management  
Association  
  
Patricia Yates, "Holiday Which"  
Consumers Association

Barry Goddard  
Terry Golding  
Geoffrey Gray-Forton  
Graham Greene  
Jonathan Griffin  
Yvonne Guerrier

Other contributors

Robert Acland  
Richard Allen  
Robert Anderson  
Michael Ann  
Judith Anthony  
John Bamsey  
David Battersby  
Harry Baum  
Alan Bishop  
Ailsa Blair  
Dawn Blee  
Charles Blowfield  
Cairns Boston  
Linda Bolitho  
Susan Briggs  
Robin Broke  
Colin Browne  
Colin Clarke  
Barry Cleverdon  
John Cole  
Chris Collier  
Patricia Crimp  
James Crump  
Bill Culshaw  
Mary Curnock Cook  
Nick Cust  
Sarah Dale  
Sandie Dawe  
John Dawson  
Roger de Hann  
Derek Dear  
Colin Doyle  
Michael Edwards  
Harvey Elliott  
Jennie Ervine  
Matthew Farrow  
Trevor Foley

Carole Foreman  
Jerry Fowden  
Sue Garland  
Jim Graham

Albert Hampson  
Brian Handley  
Colin Hobbs  
Max Holden  
Peter Holland  
Caroline Horrigan

Jenny How  
Simon Johnson  
James Joll  
Peter Jones  
Ray Kelly  
Lyn Lavers  
Sir William Lawrence  
Moya Maxwell  
Ken McCulloch  
Lloyd McLean  
Victor Middleton  
Stephen Mills  
Dale Morley  
Brian Morris  
Frank Mullen  
Jack Munro  
Elaine Noble  
Kim Parish  
David Phillips  
Sue Pike  
Mike Platt

Jonathon Porritt  
Gill Price  
Peter Rand  
Bill Richards  
Angie Risley  
Tony Rogers  
Peter Rushen  
Martin Sandbach  
Ann Scott  
June-Alison Sealy  
Michael Skapinker  
Sir Jocelyn Stevens  
Steven Studd  
Diane Summers  
Declan Swann  
Hugh Taylor  
Michael Taylor  
Peter Taylor  
John Tod  
Maudy Todd  
Mike Toynbee  
Roy Tutty  
Peter Varlow  
Clare Walker  
John Walker  
Stewart Walker  
Ivor Warburton  
Robert Watson  
Roddy Watt  
Pauline Wells  
Phil White  
Tim Whitehead  
Damien Whitmore  
Michael Wigmore  
John Wilkes  
Peter Worger  
Alex Youel

Tourism strategy editorial team:

Shaun Cove  
Trevor Dawes  
Rebecca Hawkins  
Stephen Hodgson  
Barbara Phillips

## ANNEX 2. ADDITIONAL DATA

**Table A.1 Percentage of domestic and overseas visitors staying in London and the regions.<sup>30</sup>**

	<u>Domestic tourists</u>				<u>Overseas tourists</u>			
	Visits %		Expenditure %		Visits %		Expenditure %	
	1987	1997	1987	1997	1987	1997	1987	1997
London	11.4	10.9	10.6	6.8	59.9	52.8	57.5	52.7
Rest of England	72.0	72.5	71.3	70.4	46.0	41.0	33.7	35.4
Northumbria	3.0	2.8	2.5	2.5	2.1	2.0	1.6	1.7
Cumbria	2.3	2.3	2.5	2.7	1.3	1.2	0.4	0.5
North West	8.3	7.3	8.9	6.6	5.6	4.9	3.2	4.0
Yorkshire	6.8	7.6	6.1	6.4	4.9	4.1	2.4	2.7
Heart of England <sup>^</sup>	13.6	12.7	10.6	8.6	9.9	8.5	4.7	5.6
East of England <sup>+</sup>	8.3	11.0	9.3	10.3	10.0	6.5	5.8	4.7
West Country	12.1	12.5	16.2	18.3	8.0	6.5	4.0	4.2
Southern <sup>+</sup>	8.4	8.9	8.3	8.3	7.9	8.3	4.8	6.2
South East	8.3	8.7	6.3	6.6	11.7	9.6	6.5	5.8
Scotland	n/a	8.3	n/a	11.2	9.0	8.2	6.0	7.0
Wales	n/a	7.5	n/a	7.5	3.8	3.6	1.9	1.8
Northern Ireland	n/a	0.8	n/a	1.9	0.4	0.5	0.3	0.4

NB: A visit to more than one destination by an overseas visitor is counted as a visit to each relevant destination; where such visits occur, the sum of all percentage shares of visits by region or country will therefore exceed 100.

<sup>^</sup> 1987 figures for former East Midlands RTB are included in Heart of England.

<sup>+</sup>1987 figures for former Thames and Chiltern RTB have been divided 4:3 between East of England and Southern.

**Table A.2 The percentage of domestic and overseas visitors making short and long visits within and to the UK, 1989 and 1997.**<sup>31</sup>

Duration of stay (nights)	<u>Domestic visitors</u>		<u>Overseas visitors*</u>	
	<u>1989</u>	<u>1997</u>	<u>1989</u>	<u>1997</u>
1 to 4	69%	75%	39%	44%
5 or more	31%	25%	53%	46%
Average duration	4.1 nights	3.6 nights	10.9 nights	8.7 nights

\*Percentages of overseas visits total less than 100 because figures for one day (nil nights) trips are not included.

**Figure A.1 The number of hours free for leisure time each week, UK, 1985-86 to 1994-95.**<sup>32</sup>

This figure has been removed to allow easier downloading of the text.

**Figure A.2 UK population by age-group, 1998 and 2008 (projections).**<sup>33</sup>

This figure has been removed to allow easier downloading of the text.



### ANNEX 3. REFERENCES

1. Office for National Statistics, *International Passenger Survey*; The UK National Tourist Boards, *UK Tourism Survey* Countryside Commission et al, *UK Day Visits Survey*; Office for National Statistics, *Balance of Payments*.
2. Office for National Statistics, UK Balance of Payments.
3. Office for National Statistics, *Annual Employment Survey and Labour Force Survey*.
4. Office for National Statistics, Inter-Departmental Business Register, Office for National Statistics, Size Analysis of UK Business, Department of Trade & Industry, Small and Medium ISME Enterprise Statistics for the UK.
5. Chartered Institute of Public Finance and Accountability, *Leisure and Recreation Statistics*.
6. Henley Centre for Forecasting, *Hospitality into the 21<sup>st</sup> Century - a vision for the future*.
7. Office for National Statistics, *Travel Trends: A report on the International Passenger Survey*.
8. Office for National Statistics, *Travel Trends: A report on the International Passenger Survey*.
9. British Tourist Authority, *The British on Holiday: A report on the British National Travel Survey*.
10. The Society of London Theatre, *The Wyndham Report: The Economic Impact of London's West End Theatre*.
11. The UK National Tourist Boards, *The UK Tourist: Report on the UK Tourism Survey*.
12. Whitbread estimates.
13. Office for National Statistics, *Travel Trends: A report on the International Passenger Survey*.

14. Countryside Commission et al, *UK Day Visits Survey*.
15. Deloitte Touche, *Quality Benchmarking Survey for Attractions*.
16. CBI Tourism Action Group, *Attracting Attention: Visitor Attractions in the New Millennium*.
17. Tom Webb, "Euro '96" - *The Lessons learned*", *Tourism Intelligence Papers*.
18. English Tourist Board, *English Heritage Monitor*.
19. ICM for *The Guardian*.
20. Forrester Research.
21. Travel Industry Association of America.
22. Forrester Research.
23. Office for National Statistics, *Labour Force Survey*. (Tourism related industries are defined as SIC92 codes 551-554, 633 and 921-927).
24. Hospitality Training Foundation, *Training: Who Needs It?*
25. Office for National Statistics, *Annual Employment Survey* and *Labour Force Survey*.
26. British Tourist Authority, *The British on Holiday: A report on the British National Travel Survey*.
27. Deloitte Touche, *Profiting from opportunities*.
28. Government Actuary's Department, *Population projections*
29. Department for Social Security Households on Below Average Incomes. A statistical Analysis 1976 - 96
30. Office for National Statistics, *International Passenger Survey*; The UK National Tourist Board, *UK Tourism Survey*.

31. Office for National Statistics, *International Passenger Survey*; The UK National Tourist Boards, *UK Tourism Survey*.
32. Henley Centre for Forecasting, *Hospitality into the 21<sup>st</sup> Century - a vision for the future*.
33. Government Actuary's Department, *Population projections*.

## **Bibliography**

Department of the Environment, Transport and the Regions, *Opportunity for Change*, 1998.

Department for Culture, Media and Sport, *Tourism - Towards Sustainability*, 1998.

Department of the Environment, Transport and the Regions, *Policy Appraisal and the Environment, Policy Guidance*, 1998.

Department of the Environment, Transport and the Regions, *Consultation Paper on a Set of Headline Indicators of Sustainable Development*, 1998.

Rural Development Commission, *The Green Audit Kit*, 1996

Department of National Heritage, *Memorandum submitted to the Environment Select Committee inquiring into the environmental effect of leisure activities*, 1995

Department of National Heritage, Rural Development Commission, English Tourist Board and Countryside Commission, *Principles of Sustainable Tourism: Opportunities for Local Action and Sustainable Rural Tourism: Opportunities for Local Action*, both 1995.

English Tourist Board and English Historic Towns Forum, *Getting It Right - A Guide to Visitor Management in Historic Towns*, 1994

Department of Employment, *Tourism and the Environment: Maintaining the Balance*, 1991.

## **Annex 4. Tourism - "Towards Sustainability"**

A consultation paper on sustainable tourism in the UK

Analysis of Responses

### **Special Notes**

Number of Responses Received - 322

In some instances comments were received in answer to a question about a topic which features as the subject of another question. For example, comments were received about the planning system (which has a set of questions in its own right) in relation to the questions about tourism as an instrument for change. In these cases, the comments were counted as relating to the questions in which the topic is covered in detail. For example, the planning comments in the tourism as an instrument of change section were counted into the responses dealing with planning not with tourism as an instrument for change. Where this has been done a cross reference to the other question is included. This analysis cover all points which were made by more than 3 per cent of respondents - the count shows the level of response. Other points have been omitted from this analysis.

Issue 1 - The Policy Framework

count **Q1. How should we measure progress towards achieving ST?  
Which indicators can be used most effectively within the UK for  
this purpose?**

- 66. Reliable data should be collected/updated to support sustainable tourism decisions. Data/indicators should be tested & applicable to regional/local level. Existing information should be used if possible.
- 31. One or a series of codes of conduct/access agreements could be established (one per sector) as the framework for achieving sustainable tourism. These could be adapted from existing codes.

**Q2 (see also Q3). The most appropriate framework for integrating sustainable tourism into strategies and plans.**

- 123. Government should take the lead by introducing sustainability in a coherent fashion through all policies & strategies. Communications of the meaning of sustainable tourism/development should be improved, perhaps via a mechanism which sets a vision, shares good practice, and sets targets.

- 76. Make it a requirement that all strategy documents (including tourism plans) contribute to sustainable tourism/Agenda 21. Minimum standards should be set and partnerships sought to give consistency across all policy areas and ensure a "best value" approach.
- 56. Amend planning guidance/develop checklists of criteria for sustainable tourism and compatibility with Agenda 21 to help local & regional organisations ensure that local development plans integrate with economic, environmental and social aspects of tourism.
- 26. Build capacity for sustainable tourism by raising awareness at all levels of the economic importance of tourism and identify the need for sustainable tourism strategies.
- 26. Find innovative ways in which local authorities can fund tourism development by, for example, changing the rules by which the Standard Spending Assessment is calculated or allowing them to divert funds from other sources into sustainable tourism development.
- 18. Review existing planning procedures to assess potential to bring about sustainable tourism. Where procedures are adequate, put statements into practice. Where procedures need amendment, incorporate this into planning guidance.
- 11. Professional associations for all disciplines that influence tourism should provide: standard guidance/training to members on sustainable tourism/Agenda 21. Make it a condition of membership that individuals/organisations subscribe to the principles of sustainable tourism.

**Q3: How can we implement the principles of Agenda 21 to integrate ST into UK policy at all levels?**

- 166. Make all local authorities responsible for developing partnerships to promote social, economic and environmental well being. Establish local/regional stakeholder/Agenda 21 groups to build consensus on all tourism strategies.
- 55. Make "sustainability/Agenda 21 a condition for public sector grant/loans (including Government funding to RTBs, LAs & Lottery). Allocate a

proportion of Government resources to regional agencies specifically to coordinate sustainable tourism strategies.

31. Adopt regulations, standards or targets for achieving sustainable tourism, e.g. to reduce packaging on food stuffs.
13. Improve quality of and promote domestic tourism to encourage longer and repeat visits.

## Suggested Indicators

55. Transport mode selected by tourists to reach/travel around destinations. Tourism contribution to congestion. Availability of "soft" transport options for tourist and resident use.
48. Awareness of/investment in sustainable tourism initiatives. No. of tourism businesses with environmental programmes/audits/awards. Number of sustainable tourism products available. Awareness of importance of sustainable tourism among agencies/signatories to charters. Number of TICs/businesses providing sustainable tourism information.
45. Level of visitor spending per visitor, year on year growth for each part of the season. Length of operating season. Satisfaction with tourism product. Number of visitors selecting sustainable tourism products. Length of stay. Type of visit.
37. Resource consumption per tourist (litter/water, etc). No. of tourists/businesses participating in/making a contribution to conservation projects, number of tourists aware of/receiving/implementing codes of conduct.
33. Number of people employed by tourism annually and seasonally job satisfaction with tourism jobs. Number of employees trained in sustainability.
30. Number of tourism related goods/services sourced locally. Local tourist business ownership. Access of local people to goods and services. Income generated by tourism (multiplier studies). Percentage of local services and charities sustained by tourism.
29. Residents attitudes to tourism (assessed from surveys). No. of authorities providing facilities for residents. Improvements in resident/visitor health through access to tourism opportunities.
22. Condition of cultural/natural heritage. No. of historic buildings on "at risk" register, number of redundant buildings put into tourism uses; number of planning consents refused on environmental grounds; number of protected areas threatened by tourism developments; number of new tourism development on green/brown field sites.

19. No. of impact assessments done for new developments. No. of sites with access plans in place/sensitive sites with realistic and up-to-date monitoring of data to protect environmental quality (e.g. Biodiversity Action Plans).
16. Investment in new tourism developments. No. of projects completed and operating year-on-year/bed spaces. No. of tourism establishments capacity for tourism. Occupancy per season/no. of businesses falling. Diversity within the industry.
15. Number of occasions on which limits of tolerance or capacity is exceeded/extent to which pressures are shifted from honey pot to under-utilised areas. Regional spread of tourism throughout the UK.
11. No. of development plans that promote a balance between tourist numbers and conservation. No. of authorities with effective visitor management programmes in place.

## **Issue 2 - Benefiting Local Communities**

### **Q4 (see also Q3 and Q7). Ways in which tourism can be managed to ensure that it benefits local communities, while minimising potential problems.**

68. Encourage tourism businesses to promote regional attributes/provide outlets for local traders, purchase locally, promote local foodstuffs & adopt local employment policies especially for guides. Encourage local ownership of businesses via training/co-operatives.
53. Communicate the economic, social & environmental benefits and costs of tourism to residents and businesses. Integrate environmental costs into multiplier assessments. Survey resident attitudes to tourism.
32. Enhance professionalism, pay/conditions to make tourism employment attractive to local people. Increase know-how & competitiveness of small local businesses. Ensure a wide range of economic opportunities are available to residents aside from tourism.
26. Encourage tourism facilities to make services/events available for resident use, preferably at discounted prices. Introduce "loyalty cards"/incentives in partnerships with tourist attractions. Introduce schemes to ensure residents can afford local houses.



**Q5 (see also Q13). Appropriate incentives to encourage uptake of ST**

102. Establish easily accessible grant system available to public/private/voluntary sectors/residents groups UK-wide to facilitate the development of sustainable tourism.
93. Promote financial and environmental benefits accruing from environmental improvement programmes to all tourism businesses by communicating best practice.
85. Introduce fiscal allowances, extend loan guarantees, provide low interest/business rates to facilitate sustainable tourism. Fine non-sustainable businesses. Remove measures which prejudice against sustainable tourism.
14. Provide in-kind support (training/marketing) for those businesses and authorities developing sustainable tourism initiatives.

**Q6 (see also Q16). The most effective ways in which the messages of ST can be communicated to visitors and residents.**

109. Include sustainable tourism information in promotional materials for tourists and residents e.g. information boards, TICs, brochure inserts, guided tours.
65. Government to work with existing media/Internet channels to high-light the benefits of ST to the public to encourage more sustainable behaviour.
61. Improve education for school children (by including sustainability in the national curriculum). Support this by providing information through special interest groups.
24. Develop effective signposting, carefully designed interpretative walks, alternative holiday products etc.
17. To residents through normal LA consultation processes and newsletters which communicate the benefits of ST, and which help target the "visiting friends and relatives" market with relevant information.

### **Issue 3 - Managing Visitor Flows**

#### **Q7. The specific tools or techniques which should be used to manage visitor flows in the interests of long term sustainability.**

117. Implement a range of measures to reduce seasonality.
102. Promote (especially via BTA) less well used sites/regions/cities outside London. Develop marketing partnerships & festivals/work with transport operators to promote less visited areas/change access routes/close or ration areas/develop attraction hierarchies.
66. Use signage, guided tours, trails (including city trails) & interpretation techniques (at local & regional level) which have been well tried and tested to remove pressure from over-visited sites and divert it to areas with spare capacity.
51. Improve understanding of the needs and impacts of visitors from market segmentation, especially to assess the relative benefits of different types of tourist.
50. Develop visitor management criteria/checklists and charge authorities with development/implementation of visitor/traffic management/conservation plans which integrate with marketing/development plans. These should be based on realistic visitor numbers and access for all.
43. Encourage the introduction of zoning, permits, pricing systems, timed access ticketing or pre-booking for specific activities, e.g. diving, bird watching, heritage tours, cycling. Develop partnerships to e.g. make tickets available only to certain guests.

#### **Q8 (see also Q4) The techniques that can be implemented locally, regionally, and nationally to ensure that tourism benefits the visitor and the visited.**

36. Research through pilot programmes, models which identify visitor flows capacity levels/limits to acceptable change/environmental capital concept. Apply models to tourism strategies and proposed new development to ensure they are of appropriate scale.

## Issue 4 - Transport Issues

### General Comments

189. Invest in, develop/promote integrated, intelligible public transport systems (including high speed rail/regional airports) which are frequent, reliable & comfortable. Include enquiry service; flexible, cheap ticketing, luggage transfer and quality coach stops.
73. Introduce price mechanisms (petrol, taxes, airport taxes, aviation fuel costs, parking charges, freight charges)/raise awareness of the real cost of car transport/& incentivise or subsidise public transport use (perhaps through Bus Challenge).
46. Market/incentivise the benefits of public transport/cycling through partnership between tourism providers & public transport operators. Make public transport part of the cultural experience. Publicise broadly the negative impacts of the car.

### **Q9. The specific ways in which visitors can be encouraged to use more environmentally friendly transport options: (a) to the destination.**

71. Encourage tour operators, coach operators, attractions, etc to market public transport links/combined ticketing and packages (incl. cycling) at competitive prices. Facilitate simply advance booking of in-destination travel.
60. Work with public transport providers to upgrade infrastructure: to accommodate leisure capacity (eg cycle carriage, wheelchair access etc.)/reduce timetable changes/introduce tourist services/improve appeal by competitions e.g. Buss station in bloom.
46. Introduce voucher schemes or River tickets to encourage tourists to visit a number of facilities is discounted price/offer discounted access to those arriving by public transport.
21. Improve road/public transport connections to less visited areas. Introduce a range of measures to reclassify trunk road system to encourage people to

spread the load across routes, support new initiatives e.g. National Cycle Network.

12. Improve training provision for public transport staff - perhaps via a code of practice - to give a better understanding of the needs of visitors (including the less able bodied).

#### **Q9 (b) within the destination**

117. Improve (especially pre-travel) transport awareness of businesses/visitors/residents. Encourage promotion of easily understandable & correct regional travel information in, e.g., in-flight brochures, hotel brochures, hotel brochures, guide books, Internet & TICs at Gateways.
106. Encourage provision of alternatives such as bicycle rental facilities, showers for employees, nature trails, cycle paths, trams, safe storage - recognising that they are not relevant to all groups. Provide centralised drop off points for coaches for the less fit.
86. Encourage the development of frequent, convenient, reliable public transport focussing on part & ride systems using innovative as well as traditional modes (eg. ferries) from gateways with flexible pick off/drop off points and secure parking.
46. Improve - via Planning Policy Guidance (PPG) - strategic, co-ordination/establish partnerships between those responsible for promoting tourism & traffic management to research travel patterns/build consensus over delivery/set quality standards. exchange good practice.
33. Introduce non-motorised traffic zones (pedestrianisation) or times/construct traffic calming to discourage car access.
33. Encourage tourism businesses to provide transport of appropriate scale or public transport tickets from major interchanges (e.g. the hotel/beach) and encourage attractions to develop partnerships to transport guests between facilities.
17. Recognise (via PPG) the essential need for car usage in some areas by tourists & resident. Where possible tourism should underpin transport infrastructure, safe parking should be provided (at low cost to residents) and signage improved to reduce congestion.

14. Investigate the potential to increase new techniques, for example, in-car telematics, light rail, electric cars, where appropriate. Provide incentives - especially to care hire companies - that encourage the uptake of these.

## **Issue 5 - Planning Issues**

### **Q10. How new tourism developments can be encouraged to locate in sites accessible by public transport, cycling or walking.**

103. For major facilities use Section 106 agreements/provide grants/tax breaks/planning permission to facilities of a minimum standard which: are near or enhance public transport infrastructure; on brown field sites; in character or in areas with spare capacity.
44. Issue planning guidance to prevent further development in areas of over capacity. Focus developments on under-utilised areas, near alternative transport options/ensure new developments/operational permits should consider sustainability & focus on off-peak periods.
37. Review PPG 21, 13, 17 & 6 to ensure that: out of town leisure complexes requiring car access are not approved/developments which encourage regeneration are favoured/mixed use developments are permitted where they help to regenerate.
35. Provide grants, VAT exemption to encourage developers to consider or offset costs of sustainable tourism infrastructure (e.g. installation of cycle racks). Use these grants to establish "sustainable transport zones".
35. Issue guidance/amend EIA regulations to ensure that the likely impact of tourism proposals is assessed prior to implementation using realistic assessments of costs & benefits. If possible, derive an index based on the relative costs/benefits.
33. Issue planning guidance to provide for disabled/less well off in all new facilities and ensure that designers/companies are aware of needs in new product development. Where possible without damaging historic properties, older properties should be refurbished.
23. Improve co-ordination between developers/planners & tourism officers - pre-submission - about the issues associated with ST & the role ST can play

in supporting local services. Identify zones/allocate areas/where tourism can underpin regeneration etc.

13. Accept that public transport may not be an option in rural areas and tourist facilities relying only on these facilities may not be economically viable. In these areas, ensure that tourism can be used as a tool for regeneration.
10. Facilitate the development of joint agency working groups to source funding for pilot programmes; pump-prime such programmes with public sector money/communicate best practice to such groups and provide guidance on integrated tourism strategy development.

**Q11. How tourism developments can be designed or remodelled so that they can contribute to the quality, viability, and attractiveness of urban and rural areas and help to regenerate local communities.**

91. Raise awareness - through PPG, new regulation, best practice guides, demonstration projects, establishment of minimum standards - of the regional features and traditional skills which are of value to sustainable tourism. Awareness raising activities should also include reference to the benefit of using redundant buildings, brown field sites and of sensitive landscaping.
34. Grant planning permission to development which is: built & operated without using potentially harmful materials; incorporate energy efficiency etc. in their design, use local sustainable sourced materials/labour and agree to implement a full environmental management system.
27. Assess economic viability of large projects & identify benefits to local economy prior to granting permission. Compare these to those derived from smaller programmes. Where more "sustainable" upgrade existing facilities according to conservation plans.
13. Encourage developers - e.g. through dissemination of good practice - to design facilities and sustainable tourism products which are suitable for residents & tourists.

**Q12. As accessibility to tourism is widened, how can we ensure that sustainable development considerations are taken into account.**

63. Improve, via grants' or changes to planning law, access to public transport and accommodation facilities (eg Ring a Ride and Cheap, well managed camping facilities).
32. Demonstrate the benefits of undertaking access audits/removing physical (allow specific car access, remove fences) & financial barriers (provide local attractions, utilising off-peak pricing, ensuring free access to countryside) to provide equality of opportunity.
28. LA's & voluntary groups should increase awareness of the needs/benefits of provision for these groups as tourist. Exchange good practice, improve consultation and better communicate Disability Discrimination Act.
14. Sustainable tourism principles for different social groups should be incorporated throughout the strategy/Agenda 21 strategies, not dealt with as a separate issue.
12. Encourage the development of mixed accommodation/attractions which cater for needs of all sectors of society by incorporating a range of easy access, high and low cost facilities.
11. Encourage innovative developments (perhaps by grants though DTI/New Deal) which improve appreciation of attractions by these groups e.g. virtual interpretation techniques and other technologies or access via e.g. Internet.

#### **Issue 6 - Public, Private and Voluntary Social Partnership**

##### **Q13 (see also Q5). The incentives and/or penalties that might be used to encourage sustainable tourism strategies and actions.**

94. Stimulate demand by establishing/adopting a national/regional award programme or destination designation, including an easily recognised consumer logo to differentiate those that each the "sustainable standard". Lottery funding could be used for this purpose.
50. Introduce a tax/voluntary levy on tourists or businesses. This should reflect the real cost/spread the costs of providing tourist services. Funds raised should be dedicated to further sustainable tourism. Existing tourism income/taxes should be hypothecated.

40. Introduce mandatory registration/audits for tourism establishments and/or integration of sustainability issues into routine tourism facility inspections (e.g. availability of public transfer) - perhaps supported by advice on performance improvements.

**Q14 (see also Q3, Q5, Q13). The most effective mechanism to take into account the views and interests of the tourism industry, consumers, local communities and others.**

116. Develop new/promote existing specialist tourism/Agenda 21/multi-stakeholder consultation groups/networks to take on sustainable tourism issues. These should build consensus, exchange good practice and particularly encourage private sector input.
27. Develop new/promote existing tools/guidelines/Green Business clubs to support the adoption of complementary sustainability programmes. Provide advice on key issues, for example, water saving devices, from a central point.
20. Conduct effective market research among all stakeholders to identify changing attitudes and opinions and issue market guidance to respond to these.

**Q15. Value of audits, impact assessments and environmental reports**

108. These processes provide useful data but must be periodically updated to be of value. Recommendations must be specific & measurable and results externally communicated. Small businesses in particular should be encouraged to participate in these processes.
26. Also encourage local and national destination audits, strategy appraisals or strategic environment assessment procedures. Social impact assessment and benchmarking are also important.
19. These systems are expensive and have limited value. They should be overseen by accredited quality systems to ensure consistent standards

**Q16 (See also Q6). Education and training schemes to increase awareness by (a) people employed in the sector, and (b) consumers.**

109. Quality, in-service professional training on sustainability issues from accredited organisations should be available. This should focus on attracting



& keeping local people in the tourism industry and should be relevant to small businesses. Sustainability tourism should be put into job descriptions/inductions.

55. Consumer awareness should be the focus of training programmes. Better product labelling and consumer awareness information is an essential first step, Info. can be provide through travel journalist award, the Internet and businesses and on-site.
43. Sustainable tourism issues need to be introduced to all further and higher education courses which have any interaction with tourism, including NVQs & perhaps into the final year of school.
23. Increase the number of tourism personnel provided with specific training programmes to deal with the disabled, etc. Marketing/interpretative information should be made available in Braille, etc. Accessibility should be promoted in literature.
19. A specific, brief sustainable tourism training programme should be introduced (in similar format to Welcome Host, integrated into the Considerate Hoteliers scheme, or providing specialist auditing courses). Specialist training centres could deliver these programmes for max. effect - e.g. Rural Business Centres.

© Department for Culture, Media and Sport

