



department for
**culture, media
and sport**

Welcome>Legacy

Tourism Strategy for the 2012 Games - Response summary

February 2007

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

Contents

| | |
|---------------------------------------|----|
| Section 1: Background | 4 |
| Section 2: General response..... | 5 |
| Section 3: Response by question..... | 6 |
| Section 4: Next steps | 13 |
| Appendix A: List of respondents | 14 |

Section 1: Background

The DCMS consultation on the Tourism Strategy for the 2012 Olympic and Paralympic Games – Welcome > Legacy – was carried out in full partnership with VisitBritain and Visit London. The widest-ever consultation of the tourism sector, it took forward a commitment given in the Tourism 2012 Charter (which was announced at the Prime Minister’s Tourism Summit on 15 November 2005). The Charter committed DCMS and its partners to producing a comprehensive tourism strategy for the London Games.

The consultation was aimed at the whole of the tourism industry, the associated public sector at national, regional and local levels, and other cultural sectors. New and innovative ideas were sought for getting tourism’s Games structures right, for improving our welcome and the quality of our product, for driving forward growth and productivity, and for making the best possible links to other sectors.

The 2012 Olympic Games and Paralympic Games provide the UK’s tourism industry with its biggest opportunity in recent years. The results of the consultation will now be used to inform a comprehensive Strategy for making the most of the Games as an opportunity for tourism.

Section 2: General response

The Welcome→Legacy consultation was launched by the Secretary of State for Culture, Media and Sport on 19 July 2006 and closed on 17th November 2006. 171 responses were received, representing several hundred thousand tourism businesses and individuals. This included nine substantive responses from key stakeholders to the subsequent Welcome→Legacy sustainable tourism supplement, issued in September 2006.

Many of the responses received were from representative bodies in the tourism, hospitality and leisure sectors. A number of umbrella organisations responded, including the Tourism Alliance, the Camping and Caravanning Club, the Youth Hostel Association and the Federation of Small Businesses.

In the public sector, responses were received from the Devolved Administration of Scotland and Wales, all nine of the English Regional Development Agencies, and from organisations representing local government as well as several local authorities with interests in tourism.

DCMS followed the Cabinet Office's code of practice on consultations throughout the process, maintaining an open dialogue with stakeholders throughout and giving individuals and organisations requesting limited extensions sufficient time to submit reasoned responses (25 submissions were received after the deadline).

Section 3: Response by question

Question 1: How can London, England and UK tourism industries increase levels of tourism during the Games themselves? Is this a reasonable challenge?

The majority of respondents concluded that it is a valid aim to try to buck the trend of previous Olympic Games and avoid a fall in levels of tourism during the period of the events themselves. It was felt that increasing the levels of tourism during the Games is likely to be more achievable in the regions rather than in London. The main drive for London should be not to increase tourism but to minimise the potential negative effects on regular tourism.

Suggestions made included:

- Close joint working between VB and regions to develop themed packages around the Games
- Building on business tourism as the fastest growing sector of the UK visitor economy
- Maximising PR and marketing opportunities, and especially the Cultural Olympiad
- Using places of worship to reflect the UK's multicultural society and offer multilingual support.

Question 2: DCMS considers that the position of tourism in the wider 2012 organisational structures is sufficient to ensure that its interests are fully represented and acted upon. Do respondents agree?

Although there was general satisfaction with tourism's position in the wider 2012 structures, some respondents suggested that the Minister's Tourism 2012 Group should be enlarged to include the Devolved Administrations and representatives of local government. (It is worth noting here that this has already been implemented, with an enlarged Group meeting on 23 January 2007.)

Question 3: How appropriate are the examples of previous Games to the new operational structures needed to co-ordinate the tourism preparations for 2012 at national, regional, and local levels?

There was no clear consensus view on this. Although it was generally felt that lessons should be taken from past Games, most respondents felt that full account should be taken of London's/England's/the UK's established brand positions and the uniqueness of their offers.

Question 4: Are new operational arrangements, for instance a new joint unit, needed to co-ordinate the Games marketing and other activities of VisitBritain, Visit London, LOCOG and other relevant organisations? If so, what form should these take?

Of respondents who addressed this point, there was a small numerical majority in favour of a new VisitBritain, VisitLondon and LOCOG tourism unit.

Question 5: What new marketing approaches are needed in the run-up to the 2012 Games? (Responses from organisations which are in a position to work with VisitBritain, Visit London, and other marketing bodies would be particularly appreciated).

All respondents agreed on the importance of effective marketing work in the run-up to the Games. Many felt that a single, unified brand image for UK tourism should be agreed and adopted. Suggestions made for new marketing initiatives included:

- promoting 2012 as the first sustainable Games with a carbon-neutral footprint
- One single "big idea" needed to unify marketing pre-2012 - e.g. Australia's Fun and Games campaign
- The need to emphasise that the rest of the UK is open for "business as usual"
- Promotional material for the Games should be designed by artists
- All Olympic teams' training camps should offer food and produce sourced in the region they are located in.

Question 6: How can the 2012 Games contribute to the further development of London's key gateway role?

The importance of spreading the benefits of the 2012 Games was reflected in a variety of suggestions reflecting the opportunities seen by different groups, including:

- A combined London/Britain presence at the Beijing 2008 Games
- Emphasising that the regions are "open for business"
- Marketing to promote the whole of the UK and development of specific regional packages co-ordinated to avoid unnecessary competition.
- Provision of information about areas with training camps and non-London Games venues.
- Focusing on more long-term reputation or legacy benefits

Question 7: Aside from EnglandNet, how should new communications technologies contribute to the marketing of London, the English regions, and the UK in the context of the 2012 Games?

There were many new ideas for harnessing new communications technologies to the Games opportunity. There was general support for EnglandNet, but some doubts were expressed about its effectiveness as a fully comprehensive web portal for the Games.

Suggestions made included:

- A comprehensive wireless internet network to properly market the Games
- Use of appropriate languages for regional and national tourism marketing websites
- New initiatives needed to encourage rural SMEs to get online/on EnglandNet

- Podcasts – downloaded to use as guides around London heritage attractions
- A national and international SMS text messaging campaign
- Olympic venue information put onto vehicle satellite navigation systems
- New Olympic web portal, encompassing marketing, merchandising, Games-related information, health & fitness programmes and virtual reality elements allowing full interaction.

Question 8: How can the Games be used to increase business tourism in the UK:

- *Should a joint VisitBritain/Visit London Business Tourism Unit be established, or are the present structures sufficient?*
- *And how relevant is the international Convention Centre proposal to increasing London's share of business tourism?*

The majority of respondents considered a new, joint tourism unit unnecessary. Overall, it was thought that the current structures deliver adequately, that the regions must continue be represented fairly, and that the business tourism across the country must be treated as a cohesive whole. The majority view was that London needs an international convention centre to ensure a sustainable business tourism legacy for the capital.

New suggestions made included:

- An Olympic Business Tourism Steering Group to develop Business Tourism activities
- Work through the Nations and Regions Group to ensure all regions benefit from business tourism
- A good practice standard for accessibility in business tourism
- Local Chambers of Commerce could use their international links to promote business tourism.

Question 9: Should a UK-wide percentage target be adopted for disability access, covering the whole accommodation sector rather than just the National Accessible Scheme (NAS)?

Most respondents were against a percentage target. It was felt by many that setting new national targets would be difficult because the total accommodation stock was not known. Some felt that this could be counter productive and possibly damaging to small businesses, that some businesses based in older properties could not comply, and that it would be difficult to police. Some felt that it would be better to increase use of the National Accessible Scheme through incentives.

Suggestions made were:

- Targeted local support for small businesses to help them develop their own access statements.
- Development of targets for destinations and businesses on accessibility.

Question 10: Should any or all of the following be made conditions of participating in the accommodation quality schemes?

- **Clear signposting of available accessible facilities?**
- **The reservation of accessible rooms?**
- **Independent audits of accessible facilities?**

Most respondents saw effective signposting as essential, and that the provision of information was key to helping disabled people find the right facilities and most thought that accessible audits were desirable - though there was concern about the costs of such audits to businesses. Respondents generally felt that both should be addressed through the National Quality Accreditation Scheme (NQAS).

Most respondents felt that mandatory reservations systems were unnecessary and would be difficult to monitor, although some thought that larger hotels might be able to do this. Some respondents felt that National Accessible Scheme (NAS) standards should be part of the NQAS. Some felt that the NAS was too prescriptive and should be widened out to cover other disabilities.

There was concern that Part M of the Building Regulations was failing to deliver a suitable level of new build hotel rooms for disabled people.

New suggestions included:

- New reward schemes for those businesses that meet higher standards of provision
- Better information about the business benefits from accessibility
- The production of an accessible destination guide
- Better use of the voluntary sector in provision of advice for businesses
- Disabled hotel rooms to be held until all other rooms are fully booked.

Question 11: Are the suggested Britain and England targets for accommodation quality scheme participation reasonable and achievable?

There was no consensus on this question. Although many respondents thought that the proposed targets were reasonable and achievable, about the same number made it clear that they felt that meeting them would not be possible without changes to the structures of the schemes, or to their levels of funding.

Question 12: What additional practical incentives for quality scheme participation are possible?

Almost all of those who addressed this question felt that further subsidies/other financial incentives for smaller accommodation providers to join the schemes were necessary. Many believed that such subsidies should be made at national level through VisitBritain; others that the RDAs and/or local authorities were best placed to provide this support. A minority of respondents did not believe that public subsidies of any sort were necessary. Several respondents noted the beneficial effects of the Government moving to an "assessed only" position for hotel use.

Question 13: Are separate targets for quality scheme participation needed for London? If so, what would be reasonable targets for 2008, 2012 and 2016? And is there scope for London-specific incentives to scheme membership?

Most respondents recognised the special importance of accommodation quality in the capital, with many referring to the high number of young inbound visitors expected in London in 2012. Almost all respondents who addressed the issue favoured specific targets for the capital and new London-oriented quality improvement work.

Question 14: What are the possibilities for Games-themed workforce skills projects and incentives, including effective links with the London 2012 Pre-Volunteering Programme?

People and skills are critical to the visitor experience

- Agreement on the four priority areas identified by People1st, with a focus on customer service
- There should be one Skills Strategy for now and 2012 – the National Skills Strategy (NSS)
- 2012 should be used as a catalyst but the changes are needed anyway and there is a danger that the opportunity for a step change will be missed if we focus on 2012 related projects/initiatives i.e. the sector needs long-term solutions as proposed within the NSS
- Wider 2012 structures provide potential for numerous disparate skills initiatives not understood by employers
- Need to look at migrant workers now and in 2012
- Specific skill needs around customer service, management and leadership, English language, foreign language, disability awareness, health & safety, literacy and numeracy, tour guiding, local knowledge, games knowledge, cultural awareness. Work currently underway to assesses 2012 skill needs
- Skills shouldn't be seen in isolation and is part of the wider quality product.

The Pre-Volunteering Programme (PVP) could lead to long-term improvements in skills and opportunities for local people to work in the hospitality industry

- Those trained in the PVP must be trained according to the industry's need.
- Needs to be consistency in standards between qualifications/courses used for volunteers and those used across the wider sector.

Question 15: What could best be done to improve the London/England/UK welcome in areas not covered by the grading schemes or workforce skills improvements, or in addressing disability?

Almost all respondents agreed that significant improvements were necessary in the quality of welcome, especially in London. There were many suggestions for new schemes/initiatives in this area, including:

- Visitors able to purchase Games tickets, travel and quality-assessed accommodation in one package
- A London "Street Warden" scheme for visitor hotspots
- A "Welcome Passport" scheme giving Games visitors public transport discounts and discounts at regional events to encourage dispersal
- Badging schemes to identify staff/volunteers with foreign language skills
- Extend training courses like Welcome to Excellence to wider service operatives, e.g. street cleaners, taxi drivers, transport staff in areas expecting Olympic visitors
- Use of the River Thames, drawing on innovative use of the river at the Melbourne Commonwealth Games

Question 16: What steps could be taken to improve the welcome for international and/or domestic visitors using the UK's transport network, in the context of tourism's preparations for the Games and/or the full exploitation of the legacy?

Responses have identified the need for a safe, efficient, affordable and fully integrated transport network, both in London and throughout the country. Transport planning should take account of environmental and accessible issues.

Suggestions made included:

- Easily understood ticket pricing - operator staff should ensure customers get the best deal for their money
- Help and advice available from operator staff at main transport points and from automated systems at local points
- Multilingual signage and information on services, easily understood route maps.
- Spread the benefits by promoting the use of regional airports and by transport providers promoting tourism
- Use of street wardens/volunteers to give directional information
- Taxi drivers as ambassadors.

Question 17: Do respondents have further proposals for cross-sectoral Games-related events and activities over 2008-12 which would add significantly to the appeal of the UK as a tourist destination, or to the growth of the domestic tourism market?

A high number of respondents stressed the vital importance of the Cultural Olympiad – not least, as a means to spread the benefits of the Games throughout the UK. New suggestions included:

- A new visitor attraction for the Olympic Park showcasing London's 300 languages
- Olympic-themed Summer Camps for 11-17 year-olds and families
- The use of literary and other anniversaries as part of the Cultural Olympiad
- A Thames pageant before/during Games, or to mark the 2008 handover

Question 18: Is there significant scope for further cross-marketing work between tourism, the BBC, and other broadcasters?

The majority of responses were positive in general, but very few offered anything definite. It was suggested that the BBC should make the most of the 100th anniversary of the 1908 Games, and that big screens should be used to screen the Games events across the UK.

Question 19: What form should any new strategic growth target take? Should it cover the industry's percentage rate of growth, rather than turnover? And should it run to 2012, or to a later date?

There is a consensus that tourism statistics are poor and need to be improved as a matter of urgency. Similarly there is a consensus that any new strategic growth target should be the industry's percentage rate of growth. There should be separate targets for London, other destinations and regions.

Question 20: Should any new growth target be reset in the light of changes in the accuracy of data on the domestic market, and TSA methodology – even if this results in an apparently lower target to 2010?

Overall responses have indicated a need to reset any new growth target and for the creation of a National Tourism Statistics Unit.

Question 21: Should new and separate targets be adopted for inbound and domestic tourism, and for productivity growth? And are such targets likely to enjoy popular understanding and support?

The majority agree that new and separate targets be adopted for inbound and domestic tourism and for productivity growth. In addition the target for domestic tourism should be split between overnight stays and day trips.

Sustainability supplement

General comments centred on the fact that Welcome>Legacy did not contain any substantive messages about sustainable tourism and that a sustainable approach to tourism must be embedded in all tourism policies and should not be seen as a separate type of tourism or “bolted on”.

There was debate on the need for a national sustainable tourism framework given that sustainable principles were now well known at regional level, but the general consensus was that a framework was necessary as a point of reference which sets out core principles, processes and identifies key objectives.

There was general agreement that national indicators were desirable and reflected priorities in the framework and that they should reflect the VICE model. If targets could be set to show at what level an activity was sustainable this was desirable, although many felt that setting such a target would be very difficult.

The issues set out in the chapter on shifting concerns such as climate change were important. However they should not be tackled as a stand alone subject within a new framework.

Other Matters

Funding

Although we did not ask specific questions on funding, many respondents noted the importance of appropriate resourcing for the Tourism Strategy, agreed at an early stage.

Section 4: Next steps

- We are now analysing the responses received and envisage the Strategy document concentrating on the issues raised in the consultation. That is:
 - Getting the tourism delivery structures right;
 - Effective marketing and information
 - Improving the quality of our welcome
 - Ambitious and stretching targets, and
 - Making the links with other sectors.

- The consultation responses and the resultant Strategy proposals will be developed with industry input, via existing and new stakeholder policy groups.

- Tourism Minister, Shaun Woodward will be holding meetings of the Tourism Strategy for the 2012 Games Ministerial Advisory Group throughout the spring to discuss the ideas which have emerged from the consultation. The first of these took place on Tuesday 23rd January, the second on Monday 19th February.

- The DCMS will continue to provide regular communication updates.

- DCMS plans to launch, with our partners VisitBritain and Visit London, a comprehensive strategy for the London 2012 Games in late spring 2007.

Appendix A: List of respondents

Advantage West Midlands
Alan Britten – Individual Respondent
Apollo Hotel
Arts Council England, South West
Association of Greater Manchester Authorities - Tourism Forum
Association of Leading Visitor Attractions
Association of North East Councils
Association of Professional Tourist Guides
Audiences Central
Best Practice Forum
Bridgwater College
British Holiday & Home Parks Association Limited
British Horse Society
British Hospitality Association
British Resorts and Destinations Association
British Tourism Development Committee
British Waterways
BT Group
Business in Sport and Leisure
Business Tourism Partnership
Campaign for Museums
Camping and Caravanning Club, The
Captain Cook Memorial Museum
Caravan Club, The
Cardiff Council
Career Concepts Ltd
Carol Wager - Independent Trainer
Central London Partnership
Cheshire & Warrington Tourism Board
Cheshire County Council
CILT - The National Centre for Languages
Cinema Exhibitors Association
City of London Corporation
City of York (York ATP)
Colchester Borough Council
Colin Samways – Individual Respondent
Confederation of Passenger Transport UK
Cornwall Commercial Tourism Federation
Cornwall Destination Management Organisation
Country Land and Business Association (via Tourism South East)
Coventry & Warwickshire Tourism Officers Group
Creative & Cultural Skills
Creative Industries Development Agency
CTC - National Cyclists Organisation
Cumbria Tourism Director of Development

Cumbria Tourism Industry Services Director
Dann Associates
David Hurdle - Transport Planning Consultant
David Smart Associates
David Tate – Individual Respondent
Department for Environment, Food and Rural Affairs
Destination Performance UK
Devon County Council
Disabled Holiday Info
Dorset & the New Forest Tourism Partnership
Dorset City Council
Dudley Zoological Gardens
East Hampshire Tourism
East Midlands Tourism
East of England Development Agency
Emilio Savvides – Individual Respondent
England's Regional Development Agencies
English Association of Self Catering Operators
English Heritage
Environment Agency - Thames Waterway
European Tour Operators Association
Federation of Small Businesses, The
Footscape
Gillian Pope - Independent Trainer
Global Refund UK Limited
Greater London Authority on behalf of the Mayor of London
Greenwich Council
Guild of Registered Tourist Guides, The
Guilford Borough Council
Hampshire County Council
Harbour Walk Guest House
Historic Houses Association
Imagination Ltd
Inland Waterways Amenity Advisory Council
Institute of Customer Service
Institute of Tourist Guiding
James Duddridge MP - Rochford & Southend East
Jenny Shipton - Training Officer TLH Leisure Resort
Jewellery Quarter Regeneration Partnership
Jim Johnston – Individual Respondent
Kingsway Hotel
Lambeth Council
Lancashire & Blackpool Tourist Board
Lancaster City Council
Lee Valley Regional Park Authority
Liverpool Culture Company
LiveTourism
Local Government Association
London Assembly Economic Development, Culture, Sport and Tourism Committee
London Borough of Hammersmith & Fulham
London Borough of Newham
London Chamber of Commerce & Industry
London Councils
London Development Agency

London Thames Gateway Development Corporation
Medway Council Tourism Team
Meetings Industry Association
Museums, Libraries and Archives Council
National Caravan Council
National Maritime Museum
National Museum of Science & Industry
Natural England
Natural History Museum
North West Development Agency
Northern Ireland Department for Culture, Arts & Leisure
One North East
onthisnight.com
Openwide International Limited
Oxford Marketing Group
OYBike Systems Ltd
Patchetts Green Bridleways Trust
Patent Group
People1st
Peterborough City Council
PRD Associates
Pride of Britain Hotels
Purbeck District Council
QDOS Business Service
Regional Network Language London
Resolutions
Resort Marketing Ltd
Royal Institute of British Architects West Midlands
Royal National Institute for the Blind
Royal Parks
Sarah New - Independent Trainer
Sarah Osborne – Individual Respondent
Skegness Hotels Association
SkillsActive
SO'CS Associates Consultancy Services
South East England Development Agency
South West England Regional Development Agency
South West Tourism
Southend Seafront Illuminations & Business Association
Southend-on-Sea Borough Council
Stephen Golding - Independent Trainer
Suffolk Coastal District Council
Sussex Downs College
Swindon College Course Leader Travel & Tourism
Thames Clippers
Thames Gateway South Essex Partnership
The Tourism Company
TourEast London
Tourism Alliance
Tourism Associates University of Exeter
Tourism for All
Tourism Management Institute
Tourism South East
Tourism South East Working Party

Travelodge
UK Skills
Ukinbound
V&A Museum
Visitor Attractions Forum
VisitScotland
Waltham Abbey Church
Welsh Assembly Government
West End Marketing Alliance
Westminster City Council
Weymouth & Portland Borough Council
Whitechapel Gallery
Wiltshire & Swindon Destination Management Partnership
Wimbledon Lawn Tennis Museum & Tour
Yorkshire Forward
Youth Hostel Association England & Wales Ltd