



department for
culture, media
and sport

improving
the quality
of life for all

Winning: A tourism strategy for



and beyond Executive summary



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

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

DCMS www.culture.gov.uk

VisitBritain www.visitbritain.com

Visit London www.visitlondon.com

LDA Visit and action plan for London
www.lda.gov.uk/server/show/ConWebDoc.1513

**Winning: A tourism strategy
for 2012 and beyond**
Executive summary



Foreword



Rt Hon James Purnell MP
Secretary of State for
Culture, Media and Sport

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

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

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

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

This is an opportunity that the tourism industry across the whole of the United Kingdom – one that employs a remarkable 1.4 million people

directly and injects £85 billion a year into our economy – must grasp with both hands.

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

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

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

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

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

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

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

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

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

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

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



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



Executive summary

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

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

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

What is the tourism industry?

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

How the Olympics can help tourism

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

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

Aims of this strategy

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

Engage all UK tourism businesses in a national campaign, starting at the Beijing handover. This campaign – which will be aimed equally at the domestic and inbound markets – will use bold and distinctive branding to provide an attractive and diverse image of Britain which will set the context for the welcome to domestic and overseas consumers.

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

Improve international perceptions of Britain by developing and promoting a clear and concise country brand that enhances a sense of welcome and positions Britain as a premier tourism destination, as well as being a leader in investment, export, culture and education.

Deliver a first-class welcome to all visitors – inbound and domestic. As well as improvements at our airports and other points of entry, we seek a vastly improved service to disabled people and the provision of fully accessible facilities and information.

Improve the skills of the workforce, through better management and leadership, through customer service training, through recruiting more qualified chefs and through better career development for existing and future employees. This in turn will improve retention within the industry.

Drive up quality in accommodation by a step-change in the number of hotels that are accredited for their quality, and by improving feedback from tourists.

Maximise the opportunities for increasing business visits and events, with the aim of making the UK the leading country in the world for holding business events and conferences.

Spread the benefits to ensure that **every** part of the UK benefits from the Games and the Cultural Olympiad which will precede them.

Improve sustainability by ensuring that the needs of the community are central to the development of tourism and that the

environmental impact of tourism is resolved in line with the ambition to make the Games the greenest in history.

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

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



Tourism and the economy

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

The Olympic potential

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

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

Boosting our domestic appeal

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

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

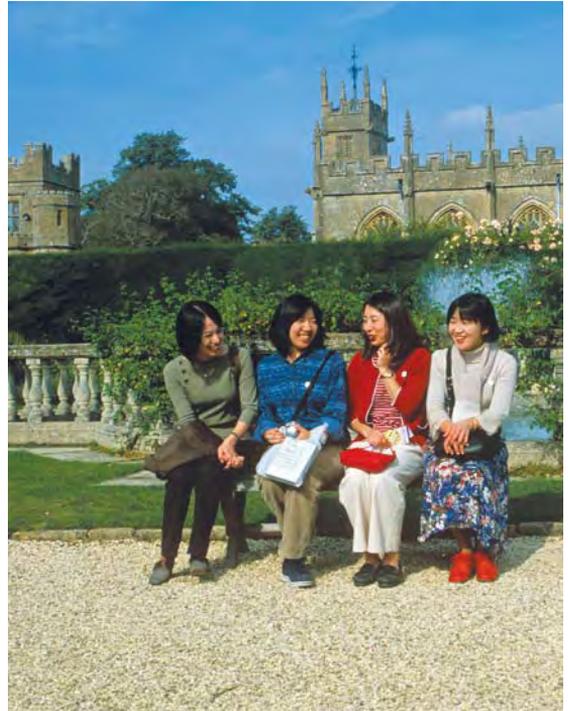
We will do this in three ways. First, we will spell out the potential benefits of the Games to all UK tourism businesses, including the domestic opportunities. Second, we will allay potential fears of London being “a building site” ahead of the 2012 Games and “too full” during the Games. And third, we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

Boosting our international appeal

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

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

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



Winchcombe, Gloucestershire

A timetable for tourism

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

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

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

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

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

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

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

Branding Britain and London

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

Beijing and the handover

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

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

Spreading the benefits

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

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

The Cultural Olympiad

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

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



Seaham, County Durham

Business visits and events

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

The value of business tourism

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

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

The business sector also helps to sustain the wider tourist infrastructure, filling seaside hotel rooms for conferences out of season. It supports urban regeneration through the provision of new conference facilities in cities like Manchester, Glasgow and Cardiff. Business tourism is resilient during economic downturns,

and business tourists who enjoy their visit can be excellent ambassadors for a destination to colleagues and friends.

Meeting business and conference needs

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

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

This is also a highly competitive sector. So we must constantly ensure that our facilities are updated to meet the needs of business. We will research their needs and those of conference organisers to inform our strategy, and we will consider a wider assessment of the

² International Passenger Survey figures

economic and employment impact of business tourism in the UK's regions and nations. There are real opportunities for growth in this sector. Although Britain is ranked third in the world for international associations events (up from fourth in 2005 and fifth in 2004: International Congress and Convention Association), it received only 4.8 per cent of the global total of US\$9 billion in 2006.

Co-ordination in the capital

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

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



Black cab, London

Welcoming the world

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

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

An improved visitors' experience

A new Welcome Charter will commit the tourism and hospitality sector to providing good service. Ports of entry are being improved – with Heathrow Terminal 5 opening next year and the new Eurostar terminal this year – and a more proficient image by immigration staff. Improved procedures will make tourist visa processing easier. The Welcome to Britain Group – a focus group for the sector – is ensuring that security requirements are balanced with providing a warm welcome to visitors.

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

Improving quality

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

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

Accessibility for disabled and older visitors

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

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



Shropshire

Better customer feedback

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

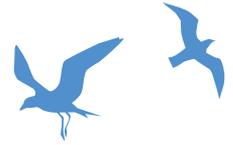
Improving London accommodation

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

Improving skills and retention

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

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



Sustainable tourism

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

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

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



Monitoring progress and tracking implementation

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

Reliable data

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

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

Tracking implementation

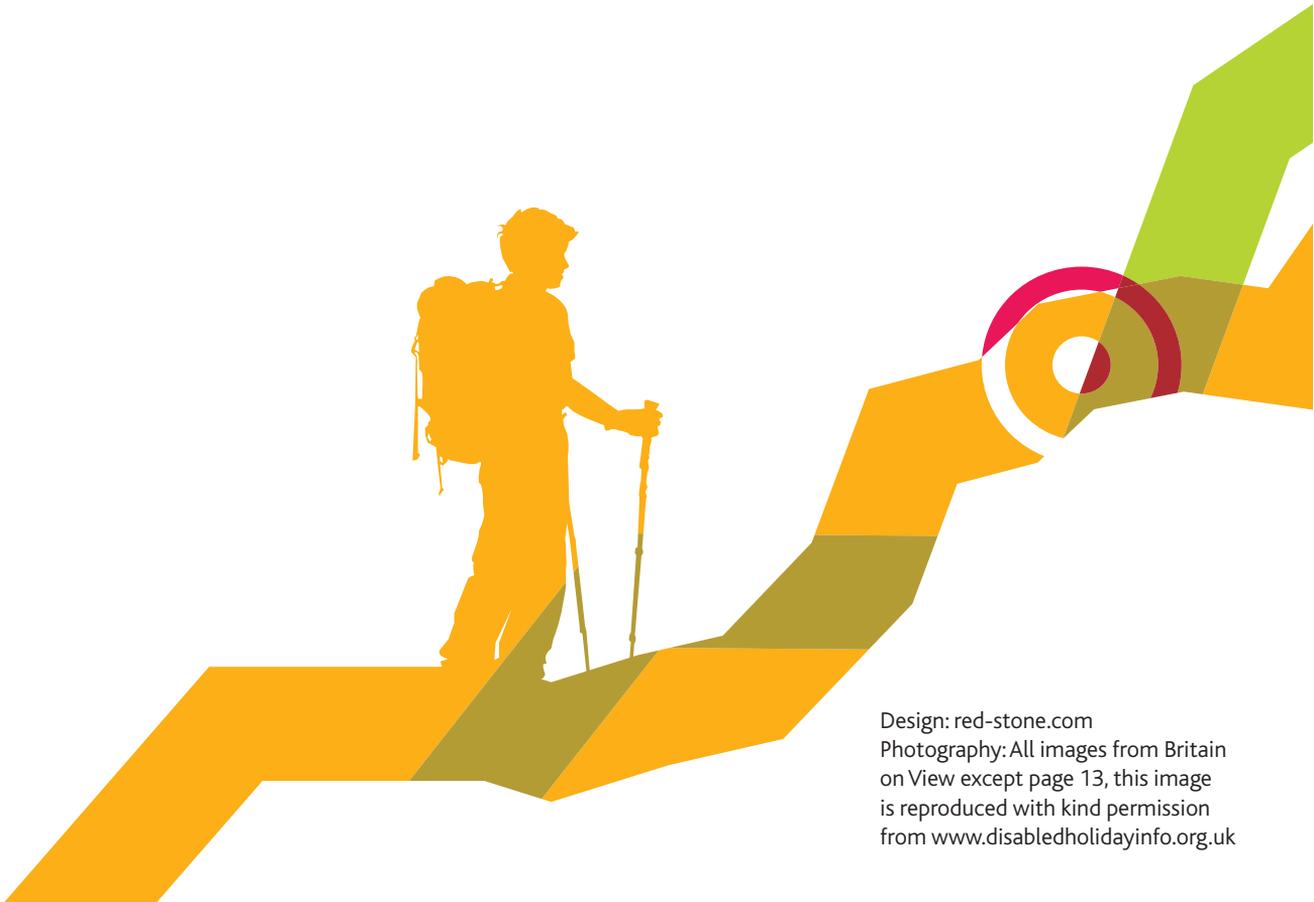
Progress towards the timetable and targets set out in this Strategy will be monitored from autumn 2007 to 2012 by a national group of senior representatives of the tourism industry, reporting directly to the Minister for Tourism. There will be monitoring of progress in specific sectors such as the hotel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

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

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

Winning: A tourism strategy for 2012 and beyond is published on the DCMS website at www.culture.gov.uk/tourism2012

This is the beginning of the journey and we are calling on every tourism business and organisation – nationally, regionally and locally – to engage in the drive to take advantage of this once in a lifetime opportunity.



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