

WELCOME>LEGACY: THE TOURISM 2012 STRATEGY CONSULTATION

Tourism South East (TSE) welcomes the opportunity to comment on the consultation. We have prime responsibility for co-ordinating and developing tourism at regional level. This includes providing strategic direction for tourism development, marketing and product development, and we cover nine counties.

Headline Issues

The initial reaction is that it is disappointing to have to comment on a series of questions rather than a more coherent plan. Time is passing and plans need to be put in place now in order to extract as much of a legacy and benefit as possible.

We have endeavoured to answer the questions as they have been set out, and these are contained in this response. We have also seen draft responses from other key stakeholders from which specific common headline issues have emerged. We feel that these warrant consideration relating to tourism and the Olympics as a whole, rather than to specific questions in the document. These are:

Funding

In order to fully implement the Welcome>Legacy strategy, adequate funding needs to be made available. We encourage DCMS to lobby HM Treasury for sufficient funds, and to allocate sufficient additional funding to VisitBritain to allow the organisation to prepare effective overseas and domestic activity.

Training

The Games should be used as a catalyst for a culture shift and step change in attitudes to customer service in the UK. Training should be at the heart of any customer service programme i.e. it would need to be aimed at everyone who comes into contact with visitors. It is logical to build on the best known, most successful and cost-effective customer service programme already operating – Welcome to Excellence.

Structures and Coherence

It is not clear from the consultation how the resultant strategy will be taken forward or who will own and lead it. The current diffuse and complex organisational aspects of the Olympics risk negating the best intentions of the strategy. DCMS, or any structure that it develops to implement the strategy, needs to truly take ownership of it and have sufficient resources allocated to make sure it is successful. An Olympic Tourism Forum, focusing on owning and overseeing the delivery of the strategy, along with mechanisms for information, policy and programme development within the industry, may be a solution.

Wider issues relating to our response

We also believe that there are wider important strategic issues to be considered that go beyond the narrow confines of some of the questions.

For example, DCMS' tourism strategy "Tomorrow's Tourism Today" states that it will 'encourage publicly funded bodies to align plans with national and regional strategies' and that the LGA will 'encourage Local Authorities to devote adequate resources to discretionary tourism marketing activities.' However, there is little evidence of either objective being met, with Local Authorities continuing to withdraw funding from tourism as pressures on budgets increase, and any overt attempts to encourage sensible alignment having been thwarted by a lack of 'carrots' to foster such collaboration. As a result, tourism remains a marginal activity for councils throughout much of the SE region.

There is a therefore a real danger of the Olympics diverting cash away from core existing programmes and priorities.

Similarly, taking England as a whole, significant public resources are currently being deployed to attract visitors to destinations around the country, most specifically in the North of England (see Annex 2). In the run up to the Olympics, if left to operate as at present, there is a risk that much of this spend will be used to create competition between regions, rather than to grow the visitor economy for the benefit of the country as a whole.

We are concerned by being limited by the range and scope of the questions – nearly a quarter of them relate to accommodation quality. Very little is made of the opportunity for public realm improvements, and the latter represents a significant proportion of the visitor experience. In terms of the opportunity to make a difference to visitor experience and welcome, one of our local authority TSE Board members suggests DCMS and DCLG should consider issuing stronger guidance to local authorities on the type and nature of improvements that should be considered in time for 2012.

The consultation says it is significantly about marketing, but its coverage of marketing-related issues is inadequate. Many of the questions embrace huge issues that can't be given simple answers, and it's hard to see them being acted on in a meaningful way in the lead up to the Olympics.

There is only a passing reference to sustainability, and less still on product development – these are significant omissions.

Monitoring the Impact

There has been a lot of forecasting of the potential benefits for tourism and the wider national economy since the awarding of the Games to London in 2012, much of it entirely justified. There can be no doubt about the tremendous, once-in-a-lifetime opportunity that it represents.

Nevertheless, targets are not meaningful without robust and accurate monitoring mechanisms in place. It is imperative to be in a position to judge accurately and unambiguously if the purported benefits are actually being accrued, and this needs to be a clear objective for all stakeholders, particularly DCMS, VisitBritain and Visit London.

Deficiencies in tourism data have been apparent for many years, and this is acknowledged by government. The Alnutt Report of March 2004 ('Review of Tourism Statistics') made 14 major recommendations for improving the acquisition and accuracy of tourism data. Underpinning these was a recognition that increased resources needed to be made available to bring the recommendations about.

TSE would like to reiterate that it is imperative for accurate monitoring systems to be in place to measure the impact of the Games, and that without them the setting of targets is essentially meaningless. We acknowledge the need for increased resourcing but urge a revisiting of the recommendations of the Alnutt Report to ensure a more realistic and watertight measurement of the Games' legacy.

The Questions

Answers to the 21 specific questions are as follows.

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

It requires a combination of marketing and product development with an emphasis on sustainability. It also requires a considerable increase in tourism investment, particularly from Government, in order to meet visitor expectations.

The south east does not expect any net increase in tourism other than VFR and day visits during 2012, and the real opportunity for growth is in the period 2008 to 2016 excluding 2012.

There is significant evidence to suggest that most of the Games-related related tourism will be merely a substitute for normal tourism activity during the peak summer holiday period. The South East, with its access points linked closely to London's, may also suffer from perceptions of over-crowding and inflated costs. This may have a detrimental effect on normal patterns of business in the region, both from domestic but particularly from overseas visitors.

There are however some counterbalancing opportunities for the region, based on the location of some events and proximity to London, which could allow the region to play a significant role in maximising the games-related opportunities. The SE has identified the potential for tourism strategies based around the Kent and M23 corridors (as main access routes to Stratford in East London) with further opportunities in neighbouring counties and around Dorney Lakes where the rowing events will take place. Over and above these direct opportunities, there is clearly potential for generating both staying and day visits by extending the stay of Olympics visitors either before or after the Games. The region is also well placed to generate additional VFR trips by acting as host to friends and family from further afield in the UK and elsewhere who wish to come and watch the Games, combined with the chance for social activity. However, as for any opportunity, resources will be required to realise any additional benefit. The South East currently receives less direct funding for tourism per head of population employed in tourism

than all but one other region in the UK (see Appendix 2), and therefore currently has a limited ability to help the country maximise this potential.

Recommendations

- *Regional funding for tourism needs to be more effectively distributed to fund areas of opportunity for optimising the growth of tourism for the UK as a whole*
- *Specific funding for an SE Regional VFR initiative should be made available, allowing more of those from further afield and the socially excluded to be able to afford to come and watch the Games*

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?

No we do not. Research indicates that between 50%-75%¹ of the net benefit of staging the Games, measured over a 7-10 year period, will accrue through tourism throughout the UK. From the information we have seen emerging from the DTI mini groups there does not appear to be an intention to set up a specific tourism group as part of the organisational structures for 2012. We believe this is a worrying oversight and that a specialist group should be set up sponsored by DCMS and chaired by VisitBritain whose remit will be to optimise the benefits of tourism to Britain.

In addition, we would note that tourism delivery structures in the UK have been fragmented and lacking any coherence since the 2003 changes that created VisitBritain and devolved non-marketing activity out to the regions.

Recommendation

- *Tourism should be positioned more prominently and centrally within the 2012 organisational structures via the creation of a specialist group*

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?

We are not in a position to answer this question meaningfully.

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?

Genuine partnership is required – the scope and amount of joint work that Visit London has formally engaged in with the regions (with the exception of Gateway funding) has decreased in recent years. This works against regional spread.

¹ See Appendix 1

In order for 2012 and its legacy to be successful, VisitBritain and Visit London will need to work together effectively. If they believe that a new joint Unit is the best approach, then this should be organised and authorised by Government, with the participation of other key players, to ensure cohesive leadership and have oversight of delivery of the Olympic Tourism Strategy and other industry initiatives. The setting up of a joint Unit would also reduce opportunities for duplication of effort and help to ensure complimentary rather than competitive marketing activity.

If such a Unit is set up, the relationship that it has with the regions in relation to marketing also needs to be carefully considered (see the comments in the 'Wider issues ..' section at the beginning of our response). The core partners would be VisitBritain and Visit London, but RDA/Regional Development Partnership organisations in the South East and East of England should also be actively consulted and engaged with on an issue by issue basis. Examples of these would include overflow accommodation; visits by Games visitors to destinations and attractions in the greater South East; and the South East / East of England generating a significant proportion of the estimated 70,000 volunteers required to successfully run the Games. The proposal for greater South East engagement with any new joint Unit, where appropriate, is based on our view that 80-90% of the tourism benefit to the UK will accrue in London and these regions – the three RDAs are already working together in this way.

Recommendation

- *The Greater South East should be included, where relevant, to the work of any joint Unit if it is set up*

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)?

Once again, the key issue at the heart of the opportunity relates to resources. Effective marketing costs money. 'New approaches', no matter how innovative, cannot adequately substitute for properly resourced campaigns. The current freeze (or indeed possible cut) in VisitBritain's funding, combined with the poor status of tourism funding in the South East, is the biggest barrier to effective marketing of the Games. The consultation paper makes no mention of where funding will come from to enable such initiatives. Pre 2012, VisitBritain must be funded to get the message out in key source markets that there is much more to Britain than London, and the London gateway role will not work to capitalise on the benefits for elsewhere in the UK without specific marketing activity to do so.

On the specific issue of marketing activity, already most discussion is revolving around the PR opportunity and the chance to attract significant attention from international media, as this is low cost and high impact. There are specific issues relating to the welcome which will be afforded to visiting journalists in the run up to the Games. An opportunity exists to improve the industry's skills in this area, through a specific programme which trains players at all levels how to communicate with and host the media – effectively

a 'Welcome Media' programme for all relevant staff. This would be about training business owners and marketing staff about how to appeal to the media and make the most of opportunities. Such a programme would have a legacy benefit, leaving behind valuable skills for the future. (The Welcome Host family of training courses is already a well established and effective training brand and further proposals are contained within this paper to create a wider training programme for the Games. 'Welcome Media' could form a specific component of the revitalised training programme).

E-marketing obviously provides important and cost effective opportunities for connecting potential visitors with destinations and tourism businesses in the UK. EnglandNet (EN) has a major role to play here, particularly for smaller businesses and lesser known destinations (the country's hidden gems). However, the current level of take up by tourism SMEs demonstrates that there is a huge gap between the vision of the public sector in creating the EN platform, and the perceptions of its value held by much of the industry. At this moment in time only a small number of accommodation providers are choosing to put availability on the system with few offering real-time booking. Attractions and events are yet to be able to offer this service. Our experience in the South East shows that the barriers to participation are not technological, but rather rest in the slow pace of change favoured by many lifestyle-based, small or not-for-profit businesses in the sector. Limited funding has restricted the ability of the public sector to 'sell' the benefits of EN, and the inevitable delays inherent in establishing a fully functional system has generated a mixture of scepticism and lack of urgency amongst much of the industry. Unless a properly resourced and structured programme of 'animation' is introduced, it is likely that EN will never realise its potential as a new marketing tool. Here in the South East we have run a number of effective but small scale programmes to encourage businesses to start using EN via their Local Authority or regional Destination Management Systems. A much wider programme, based on these pilots, if embarked upon as soon as possible, could allow the sector to realise the opportunity from this great asset.

Recommendations

- *VisitBritain must be adequately funded to spread the message that there is more to Britain than London*
- *A 'Welcome Media' training programme should be developed and delivered in preparation for the Games*
- *EnglandNet needs to be properly resourced with a structured programme of animation introduced*

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

London already plays a natural gateway role to the UK, both as the major draw for overseas visitors and as the place of origin for much domestic tourism (Londoners leaving the capital for day trips and short- and longer-stay holidays). However, to date the LDA and Visit London appear to have done little to actively encourage the dispersal of this benefit. A relatively small-scale scheme has been in operation (with just £250,000 per year allocated by DCMS via the LDA for collaborative projects) and has had very

limited impact in terms of encouraging additional value to the visitor economy elsewhere in the UK. The gateway role must be strengthened, and could be if the Government funds programmes of product development, linkages and the promotion of out-of-London destinations as a means of achieving the tourism potential of the Olympics.

Looking to the Games, there appears to be strong evidence from other host countries that policy decisions can either generate wider benefits outside the host city, or not, from major sporting events. (Germany and Turin are quoted as examples of where this has, and has not worked for the countries concerned).

The question implies that because London is already a gateway under normal conditions, this will also apply to the Games. However, the DCMS' own study, produced in 2005, anticipates that the displacement of resources could generate significant negative impacts on the rest of the UK (estimated at –£4bn and –30,000 FTE jobs). The last few years have seen an erosion of joint working between London and the English regions.

The creation of a joint Unit (as in Q4 above) could go some way to improve on this position but there will need to be a specific mandate to ensure that real steps are taken to guarantee that London plays a genuinely valuable gateway role. This should not be seen as a '*further development of London's key gateway role*' but as a specific set of actions to ensure that as a result of the Games the rest of the UK does not suffer.

Recommendations

- *London's gateway role must be strengthened to the benefit of out-of-London destinations to ensure regional spread*

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?

We are not in a position to answer this question in detail. However, with changes in this area happening too fast to enable sound predictions, and with the convergence of information technology and the media to what is generally called 'digital media', by 2012 this will be a significant area of opportunity.

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?***

Business tourism in the UK is worth over £18 billion a year and has grown by 53% in the decade to 2004. It is predicted to grow at a faster rate than any other tourism sector up to 2010.

Business tourism could become a natural extension for the range of products promoted via EnglandNet, with conference facilities and corporate hire products being added appropriately to the national database and sold via the international routes to market. This would create an important link between facilities and destinations which is often not seen as a factor, particularly in smaller scale business tourism events which are booked directly with venues and often generate little extra benefit to the area around. The animation requirements set out in Q5 above would obviously apply if businesses were to be encouraged to exploit such an opportunity.

2012 represents a tremendous opportunity for Britain to showcase itself as a contemporary, 'trendy' place that is a good place to do business and that has unrivalled business and conference facilities to match. Whilst the capital is undeniably central to the sector overall, and is already a highly successful host city for such events, we strongly support the consultation's assertion that VisitBritain will work through the Nations and Regions Group to ensure that a significant proportion of new business generated by the Games opportunity accrues to parts of Britain other than London.

We believe that VisitBritain and Visit London are best placed to decide whether a joint Business Tourism Unit should be established. The south east has a strong economy and a business friendly image, and is well placed geographically (in terms of being close to both London and Europe) to take advantage of an increase in business and conference tourism. The proposed Brighton Centre is a very good example of this, and other comparable facilities would also benefit from a post 2012 legacy in this sector.

We are disappointed at the lack of progress or commitment on the International Convention Centre. The ICC is about genuine market growth and international competitiveness – it doesn't detract from regional centres but helps London and the UK compete for business that might otherwise be going to Dubai, Paris, Barcelona, Hong Kong or other major international conurbations with ICCs.

We anticipate that the major opportunity to grow business tourism to the UK will be in the four year run up to the Games from 2008, after which improved business tourism volume and value will continue to accrue to the UK. Action in this area is therefore urgent to avoid missed opportunities.

Recommendations

- *We support the proposal that VisitBritain works through the NRG to ensure that a significant proportion of new business generated by the Games accrues beyond London and into wider Britain*
- *The DCMS strategy resulting from this consultation should include a renewed commitment to the International Convention Centre proposal*

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

We strongly believe a UK-wide percentage target should be resisted and that widening out the National Accessibility Scheme would create more problems than it seeks to solve. The ongoing harmonisation of the quality assurance

schemes and the recent re-launch of the NAS would be thoroughly undermined and confused by further widening of the parameters in the way suggested.

The key point is to encourage the creation of accessible facilities, not targets for the scheme.

Recommendation

- *A UK-wide percentage target should be resisted and the creation of accessible facilities should be the focus, not arbitrary targets*

10. Should any or all of the following be made conditions of participation in the accommodation quality schemes:

- ***clear signposting of available accessible facilities?***
- ***the reservation of accessible rooms?***
- ***independent audits of accessible facilities?***

The new harmonised scheme should be allowed to bed down rather than broadening it out to embed accessibility. Separate advice could be made available to niche groups but, as suggested in Q9, widening conditions of participation in the accommodation quality schemes is a recipe for confusion and would not be achievable by 2012.

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

The targets do not appear to have been set in a S.M.A.R.T way. We are under the impression (perhaps mistaken) that the 80% figure was imposed by DCMS with little consideration or research. We are no longer directly involved and are only partially aware of efforts by VisitBritain to meet these targets.

We are not in a position to answer if the targets are achievable or not.

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

There needs to be proven business generation over and above that currently received in order to bring businesses in, alongside unambiguous consumer recognition (this will require sustained promotion). It is vital to deliver benefits that justify the ongoing (and increasing) annual fees – the cost of being accredited is obviously a key issue and discounts should be a major incentive. There is evidence in the SE that SMEs that no longer qualify for RTB membership incentives are dropping out of NQAS as well as RTB membership.

Powers should be available to shut down illegal operators and a statutory registration scheme for businesses should be introduced (this is different from statutory classification, grading or Quality Assessment which we do not support).

Recommendations

- *Incentives for quality scheme participation should be reviewed*
- *Powers should be available to shut down illegal operators*
- *A statutory registration scheme for businesses should be introduced*

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 participation?

We are not in a position to answer this question. Separate targets for London should not undermine the efforts of regional partners to meet their own targets.

14. What are the possibilities for Games-themed workforce skills projects and initiatives – including effective links with the London 2012 Pre-Volunteering Programme?

2012 brings a fresh impetus to finding solutions to skills gaps and tourism businesses are likely to be principal beneficiaries. However to benefit they will need a well motivated, skilled and customer focused workforce. Whilst the Games are six years away, changing deep rooted and poor attitudes to customer service and training will take time. It will also require a co-ordinated and sector specific approach ensuring the best use is made of the limited resources available.

This involves bringing together the range of funding providers as well as all those potentially involved in skills and training. If this does not happen, there is a real danger of duplication and confusion with a plethora of schemes, initiatives and programmes being produced and rolled out leading to large amounts of public and private sector money being wasted on provision that is unfocused, lacking in suitable content and does not meet needs.

There are already an extensive range of national events taking place over the next few years and this should give ample opportunities to pilot, evolve and develop specific programmes, culminating with a national and international launch at the London World Skills Olympics in 2012.

If a structured approach is taken, there may, for example, be potential to allocate some of the Train to Gain funding specifically for 2012. However, current restrictions relating to eligibility criteria would need to be changed. Current rules mean that only full NVQs are funded and access is denied to those who wish to retrain or where they have any form of Level 2 related qualification.

Much of the potential relating to the Games is for a mass of people undertaking short, sharp and relevant training which needs to be flexible. Programmes need to be accessed and delivered on a regional and sub-regional basis so that those wanting to be involved can attend courses and programmes within their own communities. This would help raise the profile

of the Games and galvanise support across the UK rather than London being the main focus.

Any authorised programmes would need to offer some form of accreditation through QCA/Awarding Bodies and offer building blocks to other programmes.

This answer should be cross-referenced to that given in Q16 relating to 'Welcome Host'.

Recommendations

- *Greater co-ordination of the funding providers for skills and training should be paramount*
- *A proportion of the Train to Gain funding should be specifically allocated to 2012*

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?

The Transport element is essential i.e.

- Invest in public transport infrastructure, vehicles and service levels
- Improve the quality and scope of information for visitors, and make it more readily available
- Improve the ease and use of public transport via customer-friendly inter-changes
- Provide an integrated package for the traveller
- Better, more consistent welcome at ports and airports

The national TIC network has been declining over a number of years due to pressures of funding on Local Authorities. Despite the DCMS' assertion in *Tomorrow's Tourism Today* to 'support a modern network of TICs' there has been no investment or strategic thinking in this area for many years. VisitBritain are now developing a national Visitor Information strategy, but with no financial involvement, the initial proposals have been significantly reduced.

In the SE, more than 20 TICs have closed in the last five years. The current network of TICs therefore remains patchy with notable information gaps in key gateway locations like Gatwick Airport. The South East is currently undertaking a regional review of information provision and is taking a pragmatic view about the relative costs and benefits of 'stand alone' information centres. We are currently trying to establish a relationship with a national high street retailer with whom there could be a relationship of mutual benefit – stores providing information services in locations where visitors will find them; the *i* logo generating footfall and the potential of secondary spend for a retailer with a suitable product range. This initiative could be championed nationally, using the Games to crystallise the opportunity.

Tourism needs to become more of an issue for all associated groups. Many sectors which have a significant impact on the visitor experience (retail, transport etc) invariably see themselves as having little input or effect on the

industry. The idea of generating a 'welcome' needs to be spread beyond what would traditionally be seen as tourism and involve close working with sector groups/associations and larger entities such as the CBI and the trade unions.

Recommendation

- *Successful regional initiative(s) with TICs should be championed nationally in the lead up to the Games*

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?

The UK will play host to an influx of visitors from around the globe in 2012 and will attract world media attention. Providing a world class welcome will be critical, not only to the success of the Olympic and Paralympic Games but also with regard to a long-term reputation for customer service.

The welcome offered by Britain is a major issue; the latest results from the Nation Brands Index place the UK 17th out of 35 countries for perceptions of Welcome, with most Europeans placing the UK in the bottom half of their lists. The warmth of welcome from staff in tourism businesses and other service sector organisations is of critical importance to competitiveness in the global marketplace and is an important factor in the image that Britain projects before, during and after the Games.

The Games should be used as a catalyst for a culture shift and step change in attitudes to customer service in the UK. Training should be at the heart of any customer service programme i.e. it would need to be aimed at everyone who comes into contact with visitors. It therefore makes sense to build on the best known, most successful and cost-effective customer service programme already operating – Welcome to Excellence. A version of Welcome to Excellence, customised to support the Olympic and Paralympic Games, makes particular sense.

Based on an international customer care programme devised in British Columbia, Canada, in 1985, Welcome programmes are also now established in a number of other countries including Australia, New Zealand, USA, Malta, Thailand, Malaysia, the Philippines and Hong Kong. This can only be helpful in terms of international profile and understanding among arriving athletes and visitors.

The Welcome to Excellence suite comprises seven one day courses, each focusing on different aspects of customer service. Evolved new programmes would need to be modular and dynamic, and successful attendance could lead to a nationally recognised 'gold' standard of accreditation. Particular target markets identified for the roll-out of a Games version of Welcome to Excellence include:

- staff at Olympic and Paralympic venues
- tourism employees in host areas

- the 70,000 volunteers
- other staff coming into contact with visitors i.e. Customs and Immigration staff, Police Officers, taxi drivers and retail staff

On an international level, there is scope to work together with the British Columbia Tourist Board on an integrated training programme linked to the hosting of the 2010 Winter Games. Initial discussions have indicated a willingness to consider joint approaches to the preparation of new materials and resources. There is great potential for co-ordinated branding/marketing and promotion activities.

It should not be overlooked that the SE is also a key gateway and reception area to the UK for many visitors, with the Tunnel, Channel ports and key national and regional airports in the region. Greater investment in a 'sense of arrival' i.e. clean, tidy and freshly painted arrival points will create a stronger, more coherent sense of 'Welcome'.

Recommendation

- *The 'Welcome to Excellence' customer service programme used be used as the Games template and built upon where appropriate e.g. 'Welcome Media' – see Q14*
- *All arrival points should be 'spruced up' to ensure a stronger and more cohesive feeling of welcome*

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?

TSE has joined forces with its RDA (SEEDA), Sport England South East and Culture South East to employ a co-ordinator who has produced a Major Sports Events Strategy for the region. Upcoming events include the Tour de France coming to London and Kent in 2007 with its obvious potential for further capitalisation. The Tour of Britain cycle race is also being supported for the next two years and the aim is to raise the profile of the South East through these events. There is an Archery World Cup in Dover in July 2007 which will also bring participants and spectators from Europe and beyond and, although it is not an Olympic sport, a bid is being prepared to secure golf's Solheim Cup in 2010 which would have a significant impact and exposure across the globe if the bid is successful. Some or all of these events could carry brand endorsement of support of the Games.

In addition, we understand that the consortium of UK cities that came second to Liverpool for Culture Capital are working together to make the most of the Cultural Olympiad. In the SE this includes Oxford, Canterbury and Brighton.

The SE also has a particular strength in terms of staging events and festivals, and this will be built on in the Cultural Olympiad 2008-12 which will promote London and the UK as a cultural centre in advance of the Games.

Recommendation

- *There are a range of high profile sporting events in the SE from 2007 onwards that could carry brand endorsement of support of the Games*
- *Cultural Olympiad 2008-12 should be given due prominence in promoting the UK in advance of the Games*

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

Programmes as diverse as *Coast* and *Pride & Prejudice* have demonstrated how TV can generate tourist visits, both domestically and internationally. There is perhaps an opportunity for the BBC to use these programmes as 'loss leaders' to stimulate positive images in target countries, providing screening rights free of charge where there is particular potential tourism benefit in doing so.

Recommendation

- *Opportunity for TV companies to use flagship programmes to stimulate positive images in target countries*

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?

We are under the impression (perhaps mistaken) that the £100billion target was imposed rather than consulted upon and agreed. Our priorities would be as follows:

- clarity as to the primary target (and why)
- discussion and agreement regarding realistic and challenging targets

DCMS needs to be clear what its strategic priorities are, for example:

- Jobs supported / created
- Visits – volume
- Income generated
- Growth – both in absolute terms and comparative market share
- Maintaining market share

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?

Targets and / or measurements should be set using the same methodology. A target should not be set in oranges and measured in apples, for example.

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?*

Targets have to have clarity, and be discussed and agreed by stakeholders in advance. They will also need to take into account the level of resources available and competitor activity.

APPENDIX 1

Objectives and Priorities for the Olympics

TSE chairs the Visitor Economy Sub Group of the South East element of the Nations and Regions Group, and has prepared a consultation document '*On Your Marks ... Get Set... Go!*' – *Optimising the 2012 Games Opportunity for the South East*. The document can be viewed via <http://www.industry.visitsoutheastengland.com/london2012/visitoreconomy.aspx> and the headlines are as follows:

The Sub Group believes that tourism is the principal beneficiary of the Olympics and that between 50%-75% of the net benefit of staging the Games, measured over a 7-10 year period, will accrue through tourism throughout the UK.

It is the Sub Group's intention for the South East to be the location of choice for competitors, teams, visitors and the media.

Principal objectives are as follows:

- Optimise tourism income from the Games
- Optimise cultural (festival) benefits from the Games
- Take full advantage of sporting heroes, events and venues in the South East
- Ensure a skills legacy is derived from the Games
- Ensure an enhanced tourism infrastructure and public realm legacy is derived from the Games

12 key priorities have also been identified, with an underlying theme of sustainability embedded through them:

Conditions for success

1. Finding sufficient Funding & Investment
2. Improving Partnership working
3. Ambition to be world class

Key Actions

4. Raising the Profile – potential promotion and packaging gain
5. Ensuring a Product Quality uplift
6. Improving the Welcome

Securing the legacy

7. Realising the potential infrastructure gain e.g. new Brighton Centre
8. Improving the Sector profile
9. Workforce skills uplifted and updated

10. Product enhancement
11. Improving sector innovation
12. Potential to attract major events

APPENDIX 2: Tourism in the Regions – The contribution to the UK economy compared to the allocation of funding.

UK Region	Total Visits	Total Spend by Visitors	Total Tourism Employment	Combined Ranking of the Tourism contribution to the UK economy	Rank	Total devolved direct Investment in Tourism	Total devolved Investment in Tourism per head of population employed in Tourism	Ranking of the investment in Tourism per head of population employed in Tourism
	(M)	(£M)	(‘000)					
South East	218.29	10,416	293	2	1.92	6.55	10	
South West	103.68	7,028	144	7	5.7	39.58	5	
London	156.00	12,773	331	1	13.7	41.39	4	
East Midlands	83.76	4,013	108	9	2.65	24.54	6	
West Midlands	105.53	4,754	303	=4	5.2	17.16	8	
East of England	133.57	5,176	170	6	0.54	3.18	11	
Yorkshire	101.02	4,124	158	8	3.36	21.27	7	
North West	123.84	6,026	225	3	3.7	16.44	9	
North East	36.31	1,838	71	11	3.3	46.48	3	
Scotland	110.27	5,693	197	=4	65.3	331.47	2	
Wales	58.49	3,435	89	10	35.1	394.38	1	
Total for UK regions	1230.76	65,276	2,089		176.11	84.30		

Tourism South East, January 2005.

Sources of Data:

United Kingdom Tourism Survey 2003, VisitBritain, VisitScotland, Wales Tourist Board and Northern Ireland Tourist Board; International Passenger Survey 2003, Office for National Statistics; GB Leisure Day Visits Survey 2002-2003, VisitBritain; Annual Business Inquiry 2002, Office for National Statistics; Regions in Figures, Office for National Statistics; Scottish Executive/VisitScotland; Welsh Assembly/Wales Tourist Board; VisitBritain.