Tourism Growth Strategy

Appendix
### Appendix 1

#### SWOT ANALYSIS

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
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<tbody>
<tr>
<td>• Location, proximity to centres of population</td>
<td>• Location- it's easy to pass through</td>
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<tr>
<td>• Ease of access</td>
<td>• Poor transport infrastructure and congestion east/west</td>
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<tr>
<td>• Cultural diversity</td>
<td>• Regional marketing around rail network</td>
</tr>
<tr>
<td>• Communications</td>
<td>• Image/perception</td>
</tr>
<tr>
<td>• Large population</td>
<td>• Poor perception of relevance of Olympics to Beds</td>
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<tr>
<td>• Small- easier to manage</td>
<td>• Apathy and confusion</td>
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<tr>
<td>• Transport infrastructure, road, rail and airport links</td>
<td>• Communication</td>
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<tr>
<td>• Woburn/Whipsnade</td>
<td>• Lack of leadership in private and public sectors</td>
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<td>• Unique acreage devoted to exotic species</td>
<td>• Poor quality attractions/accommodation</td>
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<tr>
<td>• Transport heritage- Cardington/Shuttleworth</td>
<td>• Standard of shops and restaurants generally low</td>
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<tr>
<td>• Open spaces- rural and pretty</td>
<td>• Funding</td>
</tr>
<tr>
<td>• Forests/Marston Vale</td>
<td>• Regional identity</td>
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<tr>
<td>• John Bunyan</td>
<td>• Duplication at local level</td>
</tr>
<tr>
<td>• Pubs/restaurants/hotels and B&amp;B’s</td>
<td>• Travelling around the county on public transport</td>
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<tr>
<td>• Clean slate- structure and identity</td>
<td>• Low priority relative to other issues such as housing, education, crime etc.</td>
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<td>• Bedford River</td>
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<td>• Sports</td>
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<tr>
<td>• Government strategy for new build</td>
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<tr>
<td>• New attractions- NIRAH/Center Parcs, Cardington Airship Sheds, Warner Brother Film Studio. Good quality of attractions</td>
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<tr>
<td>• Festivals and events, outdoor festivals, annual events, Glen Miller Festival, Jazz and Jive, Luton Carnival, River Festival, Regattas</td>
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<tr>
<td>• Clusters of theme groups- conservation, literary heritage, wartime heritage</td>
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<td>• Rural countryside</td>
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<tr>
<td>• ‘VFR’ potential</td>
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<tr>
<td>• Cluster of ‘wild animals’</td>
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</tbody>
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DRAFTED BY MARY LYNCH ASSOCIATES
### Opportunities

- Expansion of Luton Airport
- Development plan and strategy
- NIRAH and Center Parcs will help to create destination
- 2012 Olympics
- Employment creation
- Improve quality
- Cross package across different sections of leisure and tourism
- De-stress zone out of growing conservation
- Green tourism/green infrastructure
- Proximity to London Gateway UK
- Potential to change (hidden assets)
- Could be world leader of land management
- Cardington Airship Hangers and Warner Bros
- Managed growth
- Cross boundaries/regional working/partnerships
- Investment in accommodation
- Improved brands-new brands. A Bedfordshire pub guide- what is the ‘spirit’ of Bedfordshire?
- Cranfield Airport-business and leisure expansion
- Regeneration potential
- Canal
- Weekend vacancies in accommodation
- No baggage-blank canvas
- Conference potential
- Heritage
- Development of Academic Trust
- Local government reorganisation
- University accommodation
- Cohesive approach-communications and strategy
- University of Bedfordshire
- Better marketing/exploitation of heritage
- EEDA funding
- Web marketing
- Engagement with private/public sector

### Threats

- Congestion- damages industry
- E/W links- long time to come
- Proximity to MK
- NIRAH/Center Parcs
- Recruitment and retention of staff
- Poor perception of jobs and careers in leisure and hospitality
- Pressure on public finances
- Sub-regional competition
- Terrorism
- Complacency
- Silo approach
- Lack of investment in public transport infrastructure
- Mismanaged growth
- Lack of awareness of rural developments
- Flip flopping-in and out of initiatives and strategies and commitment to tourism
- Everyone fighting for leisure and tourism at the same time
- New EETB in 18 months
- Skills shortages
- Quality of workforce
Appendix 2

Extract from Bedfordshire Skills Audit Report Chapter 9

9.1 Management and leadership

There are identified management and leadership skill gaps across the tourism sector in Bedfordshire and Luton, particularly in small and micro businesses. This is a serious issue in itself, and one that also tends to limit employer engagement in training and development for their employees.

Management and leadership skills are also identified as a key priority by the three relevant sector skills councils.

We consider that boosting management and leadership skills in the tourism sector is a key priority for Bedfordshire and Luton. Action should concentrate on:

- increasing employer engagement in training and development, and boosting the training culture;
- increasing demand for existing management development opportunities;
- improving the quality of human resource management, especially within SMEs;
- encouraging employers to develop trainer skills to enhance the quality of in-house training for employees;
- increasing the number of owners and managers with higher level qualifications;
- increasing membership of professional bodies and participation in continuing professional development activities;
- providing more flexible and attractive short course provision for owners and managers in Bedfordshire;
- work with learning providers to improve the quality and relevance of provision.

9.2 Recruitment and retention

Although minimal growth is predicted in total employee numbers in the tourism sector in the next four years, the demand for labour will be very extensive as a result of high labour turnover rates. It is likely that higher level skills will be required in some occupations to meet customer expectations of quality and the need to improve productivity and innovation.

Improving retention rates in the tourism sector is vital in a tight labour market, as is making the tourism sector a more appealing employment prospect for both young people and adults.
Action should concentrate on:

- working with employers to enable them to adopt proven strategies to enhance retention rates, such as family-friendly policies and career development activities;
- boosting tourism-related career guidance activities in Bedfordshire and Luton, including increasing opportunities for young people and adults to experience work in the sector at first hand;
- widening awareness of career development opportunities within the tourism sector;
- encouraging employers to target recruitment at nontraditional sections of the population, including older workers;
- ensuring that SMEs are aware of labour market trends in Bedfordshire and Luton, the East of England and nationally;
- where necessary, assist employers to recruit successfully from overseas markets;
- encouraging the use of Skills Passports.

9.3 Developing the skills of employees

Skill gaps are having a negative impact on the tourism sector's ability to compete successfully and to meet rising customer expectations. Although the match between supply and demand for learning aimed at school leavers is relatively good, the match between supply, identified need and demand for workforce development is less good. It will be important to concentrate efforts on areas identified as priorities by employers and by key stakeholding organisations, particularly People 1st. In addition to management and leadership, these are considered to be customer service and chef skills.

Demand for training leading to nationally recognised qualifications for those already at work in the tourism sector is weaker than is desirable. However, the new Sector Skills Agreements and Sector Qualifications Frameworks being developed by the sector skills council are likely to address the relevance of qualifications to tourism employers.

Action should concentrate on:

- developing, marketing and delivering training to meet identified skill gaps;
- ensuring the learning providers and employers concentrate on updating and extending skills in identified priority areas and to meet the requirements of new legislation;
- ensuring that employer requirements for customer service and communication skills are taken fully into account in the delivery of college programmes;
- ensuring that the needs of visitor attractions, including museums and galleries, are fully reflected in college provision;
- encouraging employers to appreciate the benefits of their employees gaining nationally recognised qualifications and of making their needs known to those organisations responsible for the development of the qualification framework;
- encouraging employers in a sub-sector or area to act collectively to meet demand for skill development activities;
Tourism Growth Strategy: Appendix

- extending short course provision to meet identified employer needs;
- ensuring flexibility in the timing and mode of delivery to
- ensuring that training provision is available at the time of year and in the format that is easiest for employers and their employees to access;
- raising the percentage of the tourism sector workforce with higher level qualifications;
- improving completion rates for Apprenticeships;
- accessing funding streams to help employers meet the costs of key skill development activities;
- ensuring that the tourism workforce in Bedfordshire and Luton has the skills to capitalise on the 2012 Olympic Games and Paralympic Games.

9.4 Developing the skills of volunteers

Particular issues surround the training of volunteers in the visitor attractions sectors, including the numbers involved, the difficulties of funding provision and the reluctance of some volunteers to participate in learning and assessment.

Action should concentrate on:

- equipping employers (and where possible volunteers themselves) with the skills and training programmes required to boost in-house skill development of volunteers;
- looking for innovative methods of accessing additional funding for volunteer training.

9.5 Partnership and co-ordination

The planning, funding and delivery of learning to the fragmented tourism strategy inevitably involves a wide range of public, private and voluntary sector organisations at national, regional and local level. This, combined with the plethora of different accredited and non-accredited learning opportunities makes it difficult for SMEs to comprehend the ‘system’ and to access provision and funding to meet their needs. It will therefore continue to be important to ensure that efforts are made to boost partnership activity and to co-ordinate the planning, delivery and marketing of training programmes.

Action should concentrate on:

- ensuring that the full range of learning provision and funding mechanisms is marketed to employers in a coherent and appealing way;
- encouraging employers to participate in the Train to Gain and other skills brokerage activities;
- ensuring that effective mechanisms are in place to enable the views of Bedfordshire and Luton employers to be represented to key stakeholding organisations including the Learning and Skills Council and the relevant sector skills councils.
Appendix 3

**Case study: Kent Conference Bureau and Venuedirectory.com**

Kent conference bureau represents some 55 conference and meetings venues throughout the county of Kent in South East England. Venuedirectory.com is an online venue search facility that holds perhaps the most comprehensive range of meeting facility data on hotels/venues around the world. With nearly 400 fields on which to search, browsers are able to look for a venue in a particular location with very specific and detailed requirements.

In addition to its main website, Venuedirectory.com has established customized 'private label' web sites for a number of destinations, hotel groups and conference industry suppliers. Kent conference bureau is the first destination marketing organization in the UK to have a fully customized private label web link arrangement with Venuedirectory.com, to whom it pays an annual fee for this service.

The key benefits are:

- Access to the Venuedirectory.com data distribution, technology and professional search facility.
- A customised search process to fit with the personality of the areas venues.
- Venue member’s data stored with the facility to change and update their information online at any time and add special offers.
- Receive enquiries/request for proposals from conference organizers via the website.
- Kent benefits from its ability to act as the group manager to overview site activity. It also eases the pressure on bureau staff resources by placing the onus of responsibility on the venues to update their information and add their own special offers.
- Operating statistics, which track and report on calls made available to members.

Appendix 4

**Case study: England’s North-West Conference Bidding Unit.**

England’s North-West conference bidding unit is another example that demonstrates the benefits of collaborative marketing for a number of destinations, that at one level, could be seen as competitors, but which have recognized that there is more to be gained from working in partnership with their neighbours.

The region includes Cumbria, Blackpool and Lancashire, Manchester, Liverpool, Cheshire and Warrington. Some of the funding for the project has come from the North West Development Agency.

**Benefits:** In the first six months of activity, the Unit produced 22 bid documents and won seven bids with an estimated economic impact of £1.6 million. 41 enquiries were generated with a total economic benefit of over £39 million.

Source: Marketing Destinations and Venues for Conferences, Conventions and Business Events. Davidson & Rogers. 2006.
Appendix 5

An example of a quality charter used in Museums

The Kids in Museums Manifesto

1 Be welcoming - from the car park attendant to the curator. Emphasise that the museum is family friendly in publicity and leaflets.

2 Be interactive and hands on - where kids can touch objects, and learn to know what they are allowed to handle, and what they aren’t.

3 Be pushchair accessible - with lifts where there are steps, automatic doors, and a place to store a pushchair.

4 Give a hand to parents to help their children enjoy the museum.

5 Consult with children - not just adults and parents - about what they want.

6 Be height aware - making sure that objects and art are displayed low enough for a child to see, and that signage is at a child’s height. Footstools should be provided to help.

7 Have lots of different things to do - art carts, picture trails, interactive experiences, storytelling, dressing up - so parents don’t have to do all the work.

8 Produce guides aimed at children, but also ones that children and adults can use together.

9 Provide proper, good-value food, high chairs, and unlimited tap water.

10 Provide dedicated baby changing and breast-feeding facilities, and good toilets where you can take a pushchair.

11 Teach respect - help children to learn that there are objects they should not touch.

12 Sell items in the shops that are not too expensive and not just junk, but things that children will want to treasure.

13 Have free entry where possible, or have family tickets and children’s discounts. Children may only want to spend a short time in a museum; so paying a lot to get in puts many parents off. Issue special tickets to families with young children that allow re-entry, so they can go outside for a break or even come back the next day.

14 Provide some open space - inside and outside - where children can run about and let off steam.

15 Provide some quiet space, where children can reflect.

16 Make it clear to child-free visitors that the museum is family friendly. Have special times when children are less likely to be there.
17 Have dedicated family-friendly days, when extra activities are laid on for kids, and those who want to avoid the crowds can choose not to attend.

18 Provide a crèche for young children at major museums.

19 Attract all ages, from toddlers to teenagers, without offering separate facilities for each. It should be enjoyable for the whole family - parents and children.

20 Don't make presumptions about what children do and don't like. Some kids can appreciate fine art as well as finger painting.
Case Study: ‘Be a local tourist’

Summary

‘be a local tourist’ is a campaign which encourages local residents to visit Birmingham’s attractions free of charge or at a reduced price. This helps to involve them in the local tourism offer. The campaign runs for a week pre-season in early March, to encourage further visits throughout the year – at the request of the participating attractions. A sample of participants is surveyed at the time of their visit and others 6 months later to determine post-campaign visiting behaviour. Non-participants have also been surveyed. The database which has been built up over 5 years allows us to consult residents about other topics such as the tourism strategy for Birmingham.

Aims and objectives

- To encourage residents to visit local tourist attractions by offering free or reduced entrance fees;
- Enhancing social inclusion and accessibility
- To encourage local residents to invite visiting friends and relatives (vfr) to these attractions in the future; supporting the local economy
- To broaden the audience for visitor attractions
- To undertake research into the vfr market through participants of the campaign
- To support a sense of civic pride and identity

What makes it work?

- It is resident-focused. It enables us to revitalise residents’ impressions of the city and its attractions and increase civic pride
- It works towards aims for social inclusion. It provides an opportunity for all residents to participate in the tourism offer
- Participants perceive it as a good way of saying ‘thank you’ for hosting the thousands of visitors Birmingham welcomes every year
- It generates extra visits to attractions directly as a result of the campaign
- It has helped to build up a good relationship with industry members

Results and outcomes

The campaign is used to gain feedback about ‘be a local tourist’ itself and about the vfr market and behaviour in general. The amalgamated research results from the 2003/4 campaigns show the following results:

- over this timescale, a minimum of 6,000 visits were made as a result of the ‘be a local tourist’ campaign.
- Not all attractions had the resources to monitor every local tourist visit
- two thirds (66%) of respondents were found to have had overnight visitors from outside Birmingham in the previous 12 months
- a quarter (23%) mentioned the fact that it ‘makes the locations more affordable to visit’
and outcomes:

- 49% of those surveyed would not have visited the attraction they were surveyed at without the campaign
- 69% of those surveyed visited later in the year as a direct result of the campaign
- 81% agreed that the campaign had made them more aware of what is on offer in Birmingham
- 97% said that they would recommend Birmingham as a place to visit

What measures were used?

Research was carried out through face to face surveys at attractions selected for their steady stream of attendance throughout the campaign days. Subsequent surveying was done through telephone surveys of participants and nonparticipants six months after the campaign. Evaluation of the campaign feeds into improvements each year to the campaign itself.

Unexpected outcomes

High level – and growing – participation rate by local attractions (100% repeat participation). This has generated goodwill and a positive relationship with the local industry, which crosses into other initiatives. Partnerships have been built with several departments in the council and externally. Funding was won from Advantage West Midlands, our RDA, on the basis of the outcomes we could demonstrate from the campaign.

Source: ‘Working with local residents: Case study of the ‘be a local tourist’ campaign’, Birmingham City Council
Appendix 7

Supplementary Data

1. Economic Impact. Day visitors account for the vast majority of income

2. Economic Impact – Tourism directly accounts for 6,600 FTE jobs and a further 3,000 FTE indirect jobs
3. Economic Impact – in terms of actual jobs there are 13,000 people employed in this sector, which accounts for almost 5% of all jobs.

4. Visitors on business contribute 30% of total tourism income.
5. Visitors do not stay for as many nights as in the rest of the region or the rest of the country

![Bar chart showing nights per trip]

6. Occupancy in hotels is dropping

![Bar chart showing room occupancy]
7. Weekday occupancy is falling and weekend occupancy is poor.

8. Occupancy is lower in summer
9. Occupancy has dropped in the ‘shoulder’ months.