

**WELCOME TO BRITAIN CAMPAIGN
DCMS UPDATE
September 2009**

As part of the tourism strategy for 2012 – and beyond – the Welcome to Britain (W2B) campaign was set up to act as a catalyst for accelerating improvements in the quality, skills and welcome in Britain. The campaign brings together partners from industry, local and national government, and tourism bodies across the UK. VisitBritain chairs the steering group and provides co-ordination and a secretariat.

1. WELCOME TO BRITAIN AIMS

The aims of the W2B campaign are:

- to inspire Britain's tourism and hospitality industry to significantly improve and deliver a first-class welcome to all visitors at every stage of their visit before, during and after 2012 and beyond, from first point of contact to final departure
- to ensure that this world-class welcome is recognised by the world in 2012 to ensure a lasting legacy in the shift of both perceptions and reality of the welcome experienced.

2. WELCOME TO BRITAIN RESEARCH

To help us understand where we are and what areas of welcome we need to focus on, VisitBritain has pulled together several strands of research on how welcome visitors to Britain feel. (See annexe for more details of the research sampling.)

The good news

Among departing visitors:

- 94% agreed (65% strongly) that they are likely to come back
- 95% agreed (62% strongly) that they felt welcome
- 92% agreed (56% strongly) that they are likely to recommend Britain as a holiday destination. (CAA research 2008)

Does this mean that the Welcome to Britain campaign can disband? Not quite!

Areas for improvement

- **Comparison with other countries** Although the CAA figures are quite positive, we do less well relative to other countries. In the "satisfaction league" of visitors to Britain from Europe, Scotland gets the most positive ranking (joint 8th out of 17, above the European mean). England comes 13th, Britain 15th and Wales bottom. (TNS survey 2007)
- **Perceptions of welcome** Among potential visitors, Britain also does less well in perceptions of how welcoming we are. In 2008 the annual Nation Brands Index ranked Scotland joint 8th out of 50 countries, while the UK ranked 14th. (Nation Brands Index 2008)
- **Certain touch points rate relatively poorly** Visitors feel less welcome at airports, restaurants, public transport and accommodation (CAA research and London Visitor survey).

- **Visitors who feel more welcome are more likely to recommend Britain as a holiday destination to others** Word of mouth has more influence over destination choice than any other source of information, and 78% of visitors who strongly agreed they felt welcome in Britain also strongly agreed they would recommend it to friends and family. When we look at visitors who 'agreed' (but not strongly) that they felt welcome in Britain, just 20% strongly agreed that they would recommend Britain. So to encourage emphatic endorsements of Britain, we need to improve the strength of our welcome. (CAA research)

3. WELCOME TO BRITAIN STRUCTURE

In June 2009, the structure of W2B was revised to make it less unwieldy and more efficient. Previously, it consisted of a steering group of representatives from around 20 organisations, chaired by Tom Wright, CEO of VisitBritain.

Now, the revised steering group is chaired by Christopher Rodrigues, Chairman of VisitBritain, and has been slimmed down to the heads of three work streams, covering overseas perceptions and experiences, ports of entry and exit, and "in country" experience. The "in country" experience work is devolved to the national tourist boards in England, Scotland and Wales (see p3 for diagram of the new structure). Northern Ireland and London have also accepted invitations to join.

4. STEERING GROUP

The aims of the revised W2B Steering Group are:

- to champion and support the aims of the W2B campaign
- to give strategic guidance and oversee delivery of the W2B campaign
- to work in close collaboration with key industry stakeholders to ensure full engagement in the W2B campaign
- to share best practice across the industry, from both national and international examples
- to develop and take forward their individual action plans to meet the strategic aims of the W2B campaign
- to promote the progress and success of W2B initiatives as agreed
- to evaluate and monitor implementation and progress, reviewing priorities where required.

Members of the revised Steering Group

Christopher Rodrigues, Chairman of VisitBritain (Chair of Chairs)

Keith Beecham, Director Overseas Network, VisitBritain (Chair of Overseas Group)

Sarah Barrett, Head of Group Customer Experience, Manchester Airport Group (Chair of Entry/Exit Group)

Jenny McGee, VisitEngland (Chair of England Group)

Riddell Graham, VisitScotland (Chair of Scotland Group)

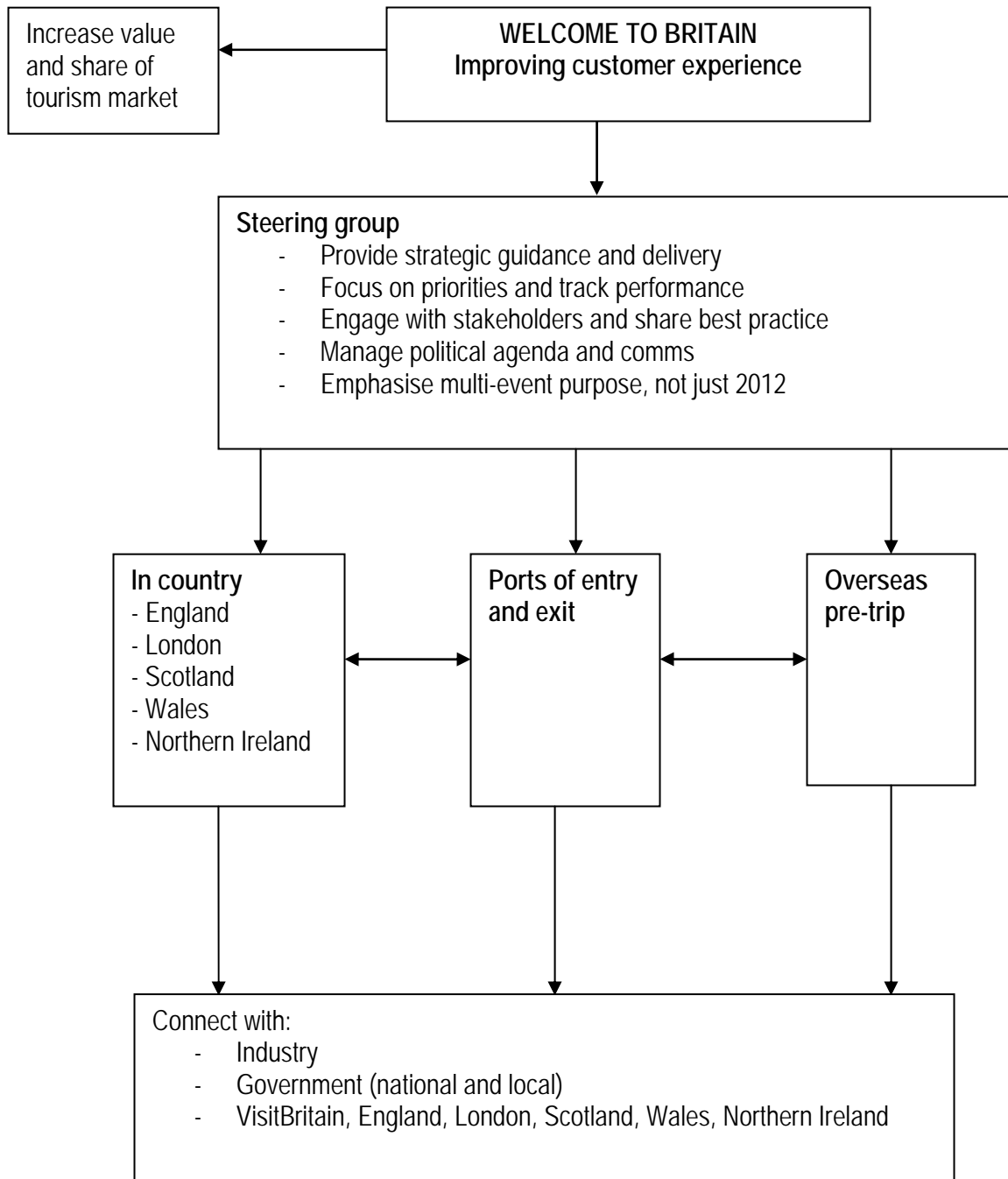
Jonathan Jones, VisitWales (Chair of Wales Group)

Kim Winter, W2B Co-ordinator, VisitBritain

Representatives from Northern Ireland and London have also been invited.

The revised steering group meets quarterly. Its first meeting was on 24 July; the next meeting is 14 October.

New structure of Welcome to Britain group



5. OVERSEAS WORKSTREAM

The aims of the Overseas workstream are:

- to understand the "customer journey" of people who are considering travel to Britain and work to improve this "journey" at touch points in their countries before departure
- to develop and promote a clear country tourism brand that enhances a sense of welcome and positions Britain as a premier quality destination
- to create and deploy marketing materials to assist with brand promotion
- to champion overseas travellers and propose improvements and enhancement to on-territory visa processing.

Chaired by Keith Beecham, Director Overseas Network, VisitBritain, the group includes representatives from the British Council, UKTI, UKBA, Tourism Alliance and the FCO.

The first meeting of this workstream was on 8 September. Ongoing work in this area includes:

- **Visas**

The Visitors Task Force has been set up by UKBA, on which VisitBritain is represented. The group meets every 6-8 weeks, and includes representatives from DCMS, ABTA, BAA, BA, UKTI, LOCOG, Tourism Alliance, and Visit London among others.

It covers various issues, including different visa categories (entertainment, sports, students, group, special events) and the issuing process (biometrics, eborders concerns). Recent discussions have centred on trials reducing the price of group visas in India and China, and on the possibility of having a cheaper add-on to a Schengen visa.

In addition, the Tourism Advisory Council has set up a working group run by VISITBRITAIN and the Tourism Alliance to look at the costs of coming to Britain - including APD, visas and our global competitiveness. This will report back at the October meeting.

- **Rolling out the Britain brand**

The FCO is planning a global campaign promoting Britain, starting to roll out at the end of October and continuing up to 2012. The Overseas group hopes that it may be able to use this as the basis for a toolkit similar to the PDP toolkit developed at the Beijing Olympics.

6. ENTRY/EXIT WORKSTREAM

The aims of the Entry/Exit workstream are:

- to improve customer service across all sectors
- to focus on and improve core processes that form the key points of the customer journey
- to share best practice within the group and its network
- to use events such as the Olympics to focus and publicise what the group is achieving.

Chaired by Sarah Barrett, Head of Customer Experience, Manchester Airport Group, the group includes representatives from UKBA, England RDAs, Scottish and Welsh ports of entry, BAA, British Ports Authority, World Class Training, Eurostar, DCMS, and Department for Transport.

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The first meeting was held on 4 August.

Ongoing work in this area includes:

- **Ports of entry welcome audit**

Following the Ports of Entry meeting at Manchester International Airport, Julia Stuckey of South West RDA is discussing the contents of the draft welcome audit template with UKBA and Howard Raynor (World Class Customer Services) with a view to finalising the areas to be audited.

The draft ports of entry welcome audit is being used at several airports and a ferry port (Portsmouth). Many other airports have asked to be involved, supported by their RDA team. LDA and SWRDA are meeting BAA to start introducing audits at Heathrow and through the rest of the group.

The aim is to work with RDAs and port managers at 10 major ports of entry in England to carry out the initial audit by the next Ports of Entry meeting in early November. Once each audit is complete, an improvement plan will be drawn up to address weaker areas, again with support from the regional team.

- **Staff training**

The National Sector Skills Councils is considering the most appropriate cross-sector training for the ports. At the moment the favoured option is a joint SSC programme led by the Institute of Customer Service and LDA, following the People 1st examples. This should be ready to trial by the end of 2009.

7. ENGLAND WORKSTREAM

The priorities of this workstream will be based on the VisitEngland strategy, which is still being finalised. Chaired by Jenny McGee, Head of Strategy and Engagement, VisitEngland, the workstream is likely to work with Partners for England (next meeting 22 September).

Ongoing work in this area includes:

- **Welcome Greeters**

These are groups of resident volunteers who greet visitors and show them around the destination, airport etc. Several RDAs across England have requested help in setting up Welcome Greeters in their key tourism destinations, and Julia Stuckey of South West RDA is currently drawing up a prioritised list of destinations.

The first operational meeting at the pilot destination of Weymouth and Portland met in August, when existing volunteer networks and other interested parties started to draw up an action plan with help from VisitKent and South West RDA.

Officers from VisitKent (the organisation responsible for setting up the first British addition to the Global Greeter network) are presenting on the Welcome Greeter project at the September International Greeter network conference, as this project will be the first concerted effort to introduce Greeters on a national scale. The New York brand manager will draw up a schedule of the most effective and efficient method of work and officially recognise the Welcome Greeters as a key part of the network.

Julia is working with members of the Government Olympic Executive responsible for the "Games Time" welcome and volunteers and with LDA, making the required links between the 2012 Games and the "Welcome Greeters". The new sector skills body for volunteering, "the Third Sector", is also providing support.

- **Excellent Welcome toolkit**

A very popular proposal with the regions and industry, the toolkit (suitable for the whole visitor economy) will offer advice, signpost to resources and industry best practice to help teams and organisations to improve the whole visitor journey, with examples of associated business benefits. It is likely to use existing national, regional and sub-regional communication channels rather than establish something new, but will link to SSCs, 2012 work etc. There are many examples of excellent customer service across England, and a large part of this role is to share best practice across the industry.

- **Welcome awards**

VisitEngland and the regions are reviewing the England for Excellence Awards to incorporate the principles of welcome. They also considered whether there should be new awards to highlight welcome activities, eg Welcome Destination awards and awards for other vital sectors, eg ports of entry, taxi drivers etc.

- **Destination audits**

VisitEngland is considering how to measure service standards across different destinations, using net promoter scores. They are also looking at how to improve customer service training in accommodation and rail travel.

8. WALES WORKSTREAM

The Wales work stream will be coordinated by Jonathan Jones, Director of Tourism and Marketing, VisitWales.

VisitWales works closely with a range of organisations in both the public and private sector. Significant among these is the Ministerial Tourism Advisory Panel (TAP). This has been established to provide independent strategic advice to the Minister for Heritage. The TAP comprises tourism operators and other members with related skills and experience. Its role is to challenge tourism policies and priorities, identify new opportunities for innovative development and monitor and evaluate the effectiveness of current tourism programmes. The composition and membership of this panel has recently been revised to include greater industry and trade representation.

VisitWales' activities contribute to the wider aims of the Welsh Assembly Government as detailed in the *One Wales* document, which represents the commitments of the coalition government of Wales.

In undertaking its activity, Visit Wales will also draw on the current strategic direction from *Achieving Our Potential 2006-2013*, the national tourism strategy, which seeks to identify an effective response to the many strategic challenges that are likely to face tourism in Wales up to 2013. These include marketing Wales externally, addressing employer skills and training, investing in facilities to improve quality, and developing the product - each of these areas now features as tourism commitments in *One Wales*.

In terms of the W2B strategy the following objectives of VisitWales are relevant.

- **To support the tourist industry in improving visitor satisfaction**

Wales needs to be a high-quality destination that offers a distinctive experience throughout the year. There should be a close match between the promise made to visitors and the experience delivered. Improving skills within the tourism industry is vital, as Wales needs a professional workforce delivering excellent quality that meets the expectation of visitors.

- **Improve positive perceptions and build the Wales brand**

Wales needs to have a distinctive brand that challenges perceptions. A strong brand identity needs to be reinforced at all levels of the industry.

In terms of skills development, developing the Wales brand and assuring customer satisfaction, several ongoing Visit Wales work programmes work in tandem. These comprise :

- quality standards and grading using the "harmonised" and other assessment schemes
- Croeso Cynnes – accredited learning that will deliver a customer service qualification
- Croeso i Gymru and Croeso Cymraeg – two self-assessment schemes that encourage businesses to develop their sense of place, thereby helping to build the Wales brand.

Structures such as the Wales Tourism Alliance and the TAP already exist to monitor progress across all objectives. A strategic plan has been developed for delivering a "Welsh Welcome" to the Ryder Cup in 2010. The plan has been developed in the knowledge that there will need to be a high degree of collaborative working between government, private, public and third-sector organisations to ensure its effective delivery. An evaluation of the effectiveness of the plan's implementation may help develop the strategic direction of W2B in the context of 2012 Olympics.

9. SCOTLAND WORKSTREAM

Chaired by Riddell Graham, this workstream is likely to take on the work through the Scottish Tourism Forum.

VisitScotland's Visitor Experience Survey in 2008 showed that 99% of visitors were very or quite satisfied with their holiday in Scotland – and 60% thought their holiday was better than expected. In addition, 73% stated that they would be "very likely" to recommend Scotland as a holiday

destination, and 24% stated "quite likely" (see annexe for details of sampling).

Positively, over four fifths of international and nearly all UK visitors are likely to holiday again in Scotland. This represents an increase on the previous year's survey. Among the nationalities interviewed, the Swedish are the most likely to return to Scotland (94%) and the Spanish are the least likely (66%).

The complaints statistics compiled by VisitScotland for 2008 show that efficiency of staff (23%), efficiency of owner (22%) and attitude of owner (18%) were in the top 10 complaints across all QA accommodation sectors. Other top 10 complaints were largely about standard of facilities and housekeeping.

Ongoing work in this area includes:

- **Skills**

- Responsibility for this within Scotland sits with a new Skills Task Group made up of representatives from Skills Development Scotland, People 1st, Springboard, Enterprise Agencies and Scottish Tourism Forum. A key area this group is keen to focus on is customer service.
- Customer experience is one of three key areas highlighted in the refreshed national tourism strategy being taken forward by the industry via the Scottish Tourism Forum.
- Specific initiatives/schemes aimed at improving customer service and providing an improved awareness of customer needs and welcome already in place include: 100k welcomes, Hospitality Assured (particularly strong in the Highlands), Welcome schemes promoted via QA (walkers, cyclists, bikers, golfers, anglers), listening to your customers (guide and training programme promoted by SE/HIS), annual customer service excellence conference.
- VisitScotland manages and operates all 100 local visitor information centres throughout Scotland. There is a strong focus on welcome and customer service provided to all staff in induction and continuous development training.
- VisitScotland is a Hospitality Assured accredited organisation.

- **Ports of entry**

- The Scottish government, through its international and transport teams, coordinates a strong "Welcome to Scotland" message at all points of entry - airports, ferry terminals and road border crossings.

ANNEXE

Research methodology

Below we give details of the methodology used in the research mentioned in sections 2 and 9 of this update.

Nation Brands Index 2008

- The NBI is a syndicated consumer quantitative research survey - a joint production between GfK Custom Research and Simon Anholt (a world renowned expert on nation branding).
- Online research undertaken in 20 countries (approx 1,000 respondents per country)
- Respondents are representative of the online population of each country
- Visitors may or may not have been to Britain before, so the NBI primarily measures perceptions rather than experiences
- Fieldwork takes place in July/Aug each year – reporting in Sep/Oct

CAA Passenger Survey 2008

- VisitBritain sponsored a bank of 12 questions on the CAA's Passenger Survey to understand how welcome visitors felt in Britain (Q2-Q4 2008)
- Approx 7,500 overseas residents responded to VisitBritain's questions when they departed Britain
- Interviews took place at Manchester, Heathrow, Stansted, Bristol, Cardiff, Luton, London City, London Gatwick, and Exeter airports
- Both business and leisure visitors were interviewed
- The questionnaire was asked in English only

TNS Visitor Satisfaction Survey December 2007

- TNS's research was conducted online among respondents from Britain, Germany, France, Spain, Italy, and Ireland. All respondents had taken at least one holiday or break in the past 12 months
- 4,000 respondents were asked about their experiences of visiting a range of countries – 17 in total. Responses collated here were used to calculate the 'visitor experience league'
- If respondents had not visited any of these countries, they were asked about their perceptions of these countries instead – these responses were used to calculate the 'visitor reputation league'

Scotland Visitor Experience Survey 2008

- Snapshot of tourism experience during summer months July – September 2008 in order to gain a snapshot experience
- 1,257 visitors interviewed in street while on their holiday/short break and recruited to take part in a comprehensive telephone interview on their return home
- Telephone interviews conducted with 650 of these visitors after they returned home from holiday in Scotland

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- 101 visitors from Scotland, 150 from UK other than Scotland, 100 each from USA, Netherlands, Spain and Sweden