

# **Tourism Sector Deal**

UK Tourism Industry Commitments

# Contents

Foreword (Page 3)

The Sector Deal (Page 6)

Commitments from Industry (Page 7)

Commitments Across the UK (Page 8)

Investment (Page 9)

Skills (Page 13)

Data (Page 17)

Accessibility (Page 22)

Industry Response (Page 26)

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# Foreword

By Steve Ridgway CBE:

Tourism is one of the world's most important industries, contributing 10% of global economic output and forecast to rise by 3.8% per year over the next 10 years.<sup>1</sup> It is an industry that has been at the forefront of the digital revolution, where tourism platforms have innovated and changed the way people experience destinations. At a time when greater understanding between nations is engendered by tourism, it has never been more important to ensure that Britain continues to be a world class destination competing for global business.



Our bid for a Sector Deal will back our entrepreneurs, our innovators, and our exporters, it will set out our ambition and agenda for the next five years. Tourism already delivers significant benefits to the UK economy, it is the UK's third largest service export, and is attracting record investment into Britain. That's why the industry has come forward and made some bold commitments.

- **Investment:** The UK's hotel sector currently accounts for a third of all investment in Europe, reaching €7.7 billion in 2018 (more than double the investment in the UK Screen Sector).<sup>2</sup> We will lead Europe's hotel investment with over 130,000 bedrooms in the pipeline, equivalent to 21% of the current bedroom stock being added.<sup>3</sup>
- **Skills and Workforce:** The people who work in our sector are what give us our edge – that's why the Sector has committed to creating 300,000 apprenticeships – more new jobs than the entire workforce of the UK Oil and Gas sector.
- **Data:** Tourism today is a cutting edge Tech sector of global innovators. We will scope the creation of a Data Mining Centre to join with our digital data driven companies to make the UK a world leading Data hub.
- **Accessibility:** the UK is already a world leader with record investment, and commitment across the country. We want to ensure accessibility is included as a matter of course in all development plans and deliver more for this important segment and the industry is committed to driving this. We will work to ensure that accessible imagery is used in marketing materials making accessibility part of Britain's brand proposition

The UK's Industrial Strategy is being built at a time of unprecedented change for all sectors. Planning for the future has never been so unclear, nor so necessary. From workforce challenges to productivity puzzles, all sectors need to review their international competitiveness and future for growth, whilst looking in an honest and unencumbered way at

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<sup>1</sup> World Travel and Tourism Council, Economic Impact 2018

<sup>2</sup> <https://www.bfi.org.uk/education-research/film-industry-statistics-research/reports/uk-film-economy>

<sup>3</sup> STR – November 2018

the weaknesses that hold us back. We will need to be agile and innovative and work collaboratively on a shared agenda to drive economic growth.

The Industrial Strategy's aim of underpinning the UK's leading sectors, building place to ensure that every part of the country enjoys growth, building a workforce fit for the future and fixing the UK's under indexed productivity are core to what UK tourism is today. Tourism as an economic sector takes place in every local authority and supports three million jobs of all skill levels. This an industry that cannot be overlooked.

A Tourism Sector Deal in the Industrial Strategy aims to achieve two key objectives:

- Cement UK tourism's place as a global leader, driving investment, jobs and thriving places.
- Create a new coordination of a diverse sector made up of SMEs, tech, transport and accommodation providers.

The initial bid proposal aimed to achieve a number of ambitious targets between today and 2025 which included growing the value of tourism to more than double today's value, to create jobs across every local authority, and to develop 'place' with the creation of Tourism Zones. The UK should also be a more competitive destination for business events, and the Sector Deal aims to include Business Events alongside leisure as a key priority driver of seasonal increase.

At the Tourism Industry Council in November 2018, the Secretary of State for DCMS, Jeremy Wright laid out some further asks for the sector as part of formal negotiations for a Tourism Sector Deal. This follows months of discussions across government with Ministers from Department for Business, Energy and Industrial Strategy, DCMS and the wider government departments that Tourism Sector Deal would touch upon if formally agreed.

The Secretary of State requested further commitments in the following areas:

- An investment pipeline for hotel and UK accommodation.
- Greater clarity on the Sector's commitment to accessibility.
- Commitments to collate 'big data' to better inform the industry and understand the future customer needs.
- Better understanding of the Sector's work on skills and workforce planning.

In response to these further requests, a series of discussions have taken place across the United Kingdom and at a range of levels. As lead figure in the deal, I have met with business leaders from aviation to hotel investors, and my team at VisitBritain – who have been acting as the secretariat for the tourism sector – have hosted roundtables in each of the nations, and in a number of local authority areas in England, and important local tourism markets.

This document is the product of analysis, research and data from across the entire sector and each contributor is referenced alongside their commitments. At the end of this document you will find an impressive set of commitments and actions already taken by the industry.

When the Tourism Sector set out to put together its Sector Deal, I was particularly struck by the ability and ambition of the sector to work together and to collaborate effectively. After 30 years working in different guises in this sector, I have always been aware that the diversity of tourism made speaking with one voice a challenge.

What is clear from the commitments laid out in this document is that tourism is delivering across the country. Place and tourism go hand-in-hand. From Inverness – the highest occupancy levels in the UK – to Manchester which is due to add 5,000 new rooms in the next 5 years. In Liverpool, there is impressive work underway on skills to help underpin their impressive culture and tourism offer across the city. In the South West of England, Bristol Airport is investing heavily in accessibility and world leading attractions like the Roman Baths are developing best in class training. In Wales, the Celtic Manor is spending a staggering £250m on their convention centre, and Titanic Belfast has been rated one of the UK's most accessible attractions, investing in providing a world class experience for all. We have engaged with every single nation and regions across England during this process, and I believe that the commitments they have provided demonstrate the strength of tourism in the UK today.

Tourism continues to be a successful and innovative sector with global appeal, huge further economic potential and reach which can bring prosperity and opportunity to many more people across the country.

The commitments the Sector is making here are very much a start of the new long-term partnership that tourism wants with Government.

A Tourism Sector Deal will answer the broad economic goals of a successful Industrial Strategy. Building significant and long-lasting improvements in productivity in a sector of scale, developing an unrivaled product, putting in place a workforce and a skills plan that help to improve better outcomes for people across the country, and help drive the innovation our tourism sector is renowned for, underpin the overall economic success of a major service export and Britain's 'shop window to the world'.

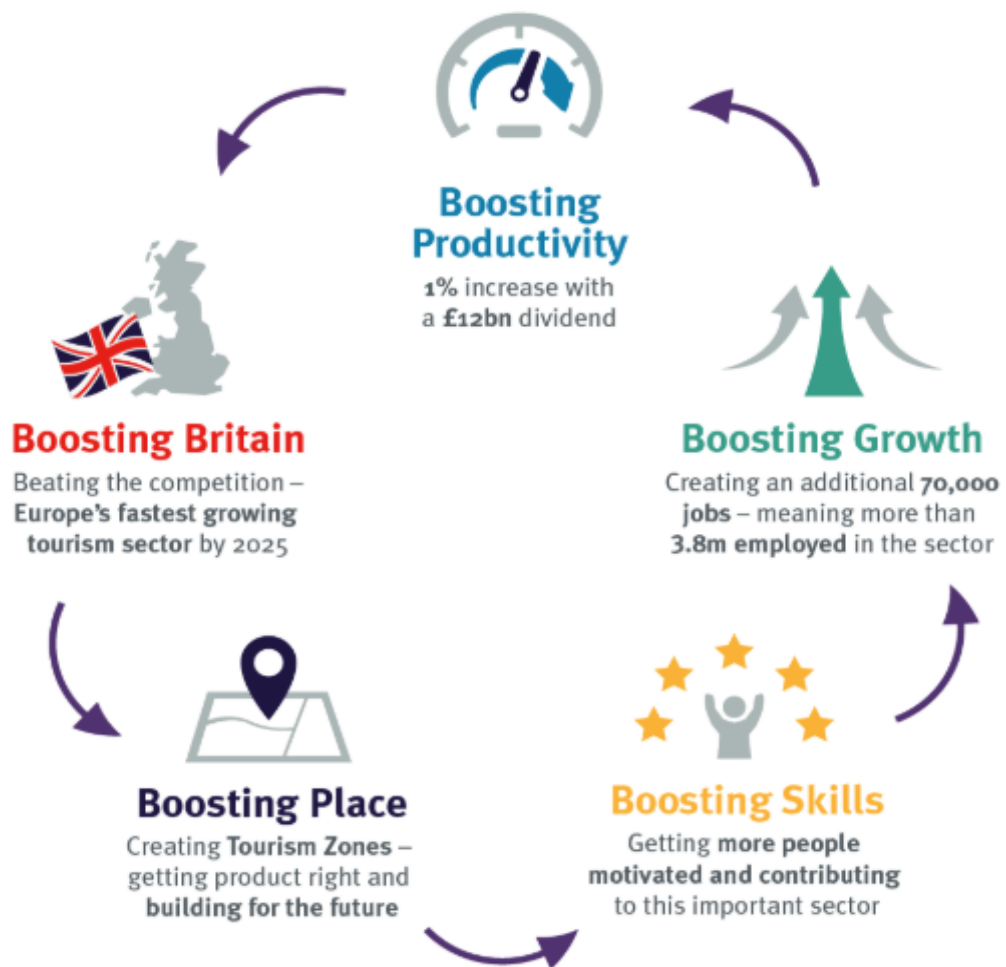
Governments around the world see the size of tourism and understand its potential. Ambitious long-term strategies are currently underway in major competitors aiming to answer almost identical issues our sector faces at home. This Tourism Sector Deal is our answer to a global challenge – making the UK the destination of choice for visitors for generations to come.

A handwritten signature in cursive script that reads "S. Ridgway".

**Steve Ridgway CBE**

# A Tourism Sector Deal

What the Sector Deal will achieve:





1. The UK will lead Europe's hotel **investment** over the next five years.



2. 300,000 **apprenticeships** will be created in the sector over five years.



3. A **data-mining centre** to be developed to understand the customer of the future.



4. The UK will be the **accessible** destination of choice.

# The Industry Commitment:

Industry commitments have come from across the UK:

## Northern Ireland

Belfast City Airport has £64,000 of planned investment in Accessibility for 2019.

Titanic Belfast has worked with local transport providers to create a seamless travel journey, and have also adapted their exhibition to cater for different abilities and special educational needs.

## North West

Liverpool has launched a Visitor Economy Passport Scheme for students studying visitor related courses. Working with 7 FE colleges and over 40 employers to provide work ready skills.

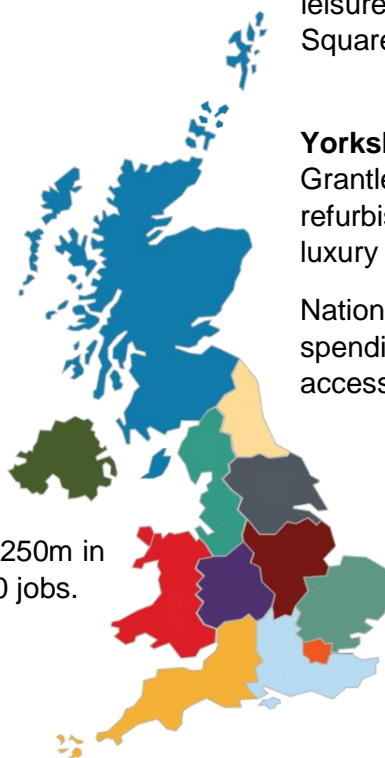
Manchester has £500million of investment currently committed to new hotels and attractions, with 5,000 rooms in the pipeline.

## Wales

The Celtic Manor is investing £250m in the ICC, helping to create 1,000 jobs.

## South West

Proposals for development of Bristol Airport to handle 12 million passengers a year will create an additional 1,000 additional jobs on site. They are also developing apprenticeships in their pipeline.



## Scotland

Edinburgh Airport has invested in staff training and facilities to improve its accessibility rating from poor to good in just one year.

Inverness is the most attractive place in the UK for hotel investment based on occupancy in 2018.

Aberdeen will see £107m hotel and leisure investment in Marischal Square

## Yorkshire

Grantley Hall is investing £70m in refurbishment work, opening a luxury hotel in summer 2019.

National Railway Museum in York is spending £50m including accessibility site access.

## Midlands

Knight Frank found that the West Midlands was the most liquid region in the UK in 2017, recording over £305m worth of transactions. It also found that the WM had the highest average value per room in the UK.

## London

According to STR reports, London has an additional 30,000 rooms in the pipeline, equalling 23% of its current bedroom supply.

## South East

Gatwick has added a new Sensory Room, Changing Places, and PRM lounges as part of £6m of capital investment. The Dementia Friends initiative has also been rolled out across the Gatwick Family.

**For the full list, see page 25**



## **Investment**

**UK Government request:** Indicate what the level of investment and pipeline of investment will be.

# Investment

## UK leading Europe's hotel investment:

The UK Government sought commitment for the hotel investment pipeline over the coming five years. With investment at its highest level ever, and almost a million hotel rooms set to reach the market by 2022, the UK looks set lead Europe in hotel investment, driven by inbound success and a stable business environment.

### **Industry Commitment:**

The UK will continue to be Europe's leading hub for hotel investment for the next decade.

Over 130,000 additional bedrooms will be added to UK accommodation stock offering an unprecedented opportunity for growth.

The Tourism Sector Deal will enable performance indicators and help to drive the necessary areas for further growth including place-making, skills and greater regional spread.

UK hotel investment is a clear indicator of the vitality and performance of UK tourism, driven by occupancy levels, overall business competitiveness, and the strength of the overall economy.

- 2018 saw €7.7bn invested in the UK. This investment is more than a third of all the investment in Europe's hotels.
- Over 130,000 bedrooms are currently in the pipeline, equivalent to 21% of the current bedroom stock being added.<sup>4</sup>
- UK inbound tourism growth will reach 49m by 2025, further cemented the UK's attractiveness as an investment capital.

The current level of investment in UK accommodation is at its highest level ever. Strong inbound performance since the 2000s, has driven some of the highest investment anywhere in Europe and looks set to continue. Investors continue to look for markets with dynamic and high performing inbound figures, alongside a competitive business environment and strong overall economic trends. In 2018, the UK saw €7.7bn investment in hotels, a third of all investment in all European markets.<sup>5</sup>

UK inbound visitors have grown from 30m annually in 2011 to just under 40m in 2018 and are expected to grow even further over the next 7 years reaching 49m by 2025.<sup>6</sup> Domestic performance is also an important driver of investment, helping to cement consistent occupancy levels year-round with 99.3m overnight trips completed by domestic visitors alone.<sup>7</sup> Hotel investment is also taking place at a local level with smaller hotels diversifying their offers and increasing their scale and it is important that their investment be recognised too.

### **Risks and Challenges**

Naturally, Hotel investment is clearly linked to overall economic confidence and likely return on investment. The cyclical nature of hotel investment mirrors that of the overall economy, and in order to maintain the current period of investor confidence, and mitigate any future downturns the industry must ensure our strong visitor economy continues to grow in value and

<sup>4</sup> STR – November 2018

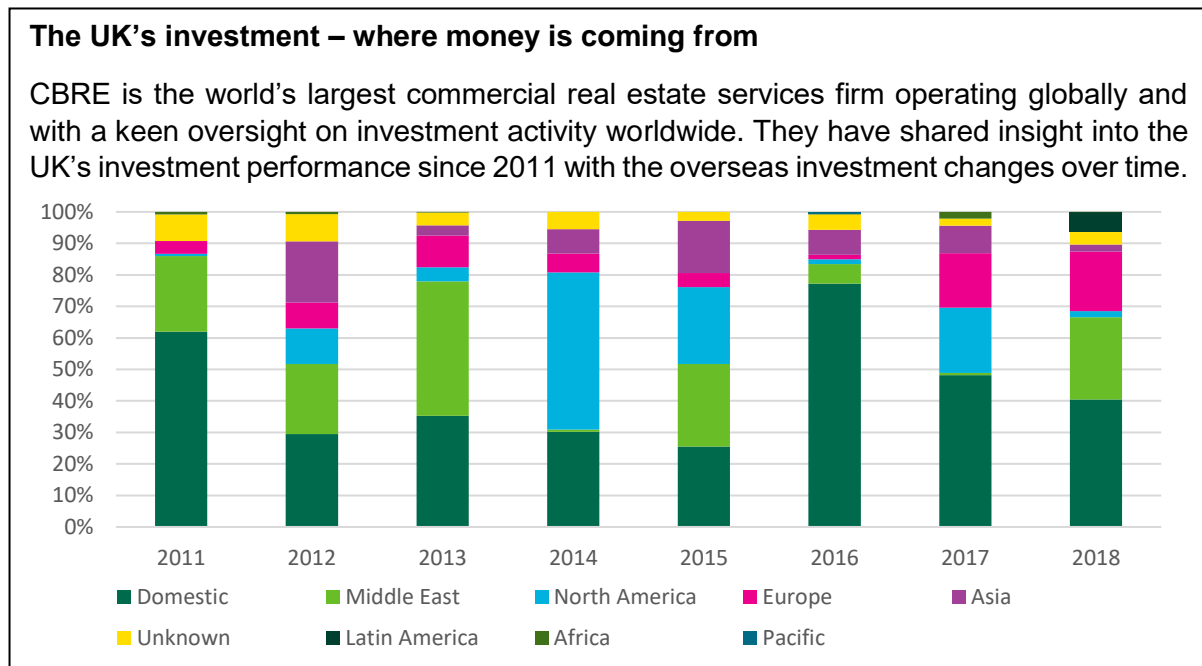
<sup>5</sup> CBRE Q4 2018 Europe Hotel investment market

<sup>6</sup> VisitBritain research and forecasting

<sup>7</sup> VisitEngland visitor factsheet 2017

volume amongst international and domestic visitors This challenge is particularly prominent in today’s context of Brexit, and a flat line trend in the average spend per visitor. We must focus our efforts to grow the value of tourism to support this investment.

Additionally, hotel investment relies heavily on a skilled and capable workforce. Across the UK, there are already a number of challenges recruiting and retaining staff, and uncertainty about how the UK’s post-Brexit immigration policy will impact the sector, is a further concern to an industry where staff shortages already exist. This is why the industry’s commitments to a skills campaign is an essential accompaniment to hotel investment. In Liverpool alone, hoteliers reported that there are currently 5,000 unfilled vacancies across the city region.



Since the Olympic Games, the UK has seen the largest increase in overseas’ visitors year-on-year for a generation. This success can be put down to a number of factors including the nation branding (the UK ranked top of the 2018 soft power 30 index)<sup>8</sup> and also the number of airline routes, product awareness and continued increases of global travel overall.

**IPS: Inbound visits**

<b>2011</b>	30.8m
<b>2012</b>	31.08m
<b>2013</b>	32.69m
<b>2014</b>	34.38m
<b>2015</b>	36.12m
<b>2016</b>	37.61m
<b>2017</b>	39.21m

The strength of inbound tourism helps shape the interest levels of investors and the change in the nature of where investors’ money is coming from reflects the vitality and resilience of the UK’s inbound tourism market.

**Underpinning Investment across the UK**

Investment across the UK is at record levels with evidence showing substantial spending already underway and billions more committed. While London makes up nearly a quarter of all new bedroom stock to 2022, the majority of investment is taking place in the nations and regions.

The UK’s attractiveness as a destination is based on many factors including culture, heritage and product diversity. There can be no doubt that London has been one of the world’s leading hotel investment capitals for decades, but the story of current levels of investment is that there

<sup>8</sup> <https://softpower30.com/country/united-kingdom/>

is a spread of investment across the country. For example, in 2018 Inverness was ranked as the number one most attractive city for hotel investment based on 83% occupancy in 2017.

There are notable success stories across the UK with significant future investment now committed in three combined authority regions;

- The West Midlands was the most liquid region in the UK, recording over £305 million of transactions from 23 deals.
- In Greater Manchester, over £500million of investment is currently committed to new hotels and attractions. Within the next 3 years, almost 5000 new hotel rooms are set to open across the region.
- In the Liverpool City Region where £364m has been invested in hotels since 2009, a golden decade of success since the European City of Culture, a further £136m will be invested by 2022 to compliment the investments in Cruise Liner Terminal and significant investment in the world heritage site on the Mersey.

In addition, national hotel brands are expanding their own portfolios across the UK, Whitbread Capital Markets report highlighting long-term growth to an 110,000 room network – creating between 1,000-2,000 UK jobs a year.<sup>9</sup> Intercontinental Hotels Group (IHG) is also investing in the UK, making it the largest luxury hotel operator with more than 2,000 rooms in the UK.<sup>10</sup>

### **SME investment**

There are an estimated 45,000 hotels in the UK and 51 per cent are independently owned and predominantly within the SME category of operation.<sup>11</sup> Whilst the figures of commitment to hotel investment at a national and regional level are large, most of the hoteliers and accommodation providers in the sector remain small and medium sized operators. Across the country, evidence is being provided showing significant private investment raising the levels and standards of hotels.

#### **Case Study: The Langdale Estate, Cumbria**

The Langdale estate comprises of two hotels, Langdale and Brimstone, a spa, fitness and leisure facility, Stove restaurant, 100 timeshare/self-catering units and Wainwrights' Inn. Langdale Leisure Ltd has a turnover of approximately £9 million and employs 175 staff. Langdale Leisure Ltd and Langdale Owners Club have invested £15 million in the past 8 years and have an on-going investment programme of approximately £1.2 million annually.

Langdale provide rooms for 70 staff on site. Last year they invested £75,000 in refurbishing staff accommodation and £25,000 to upgrade staff welfare facilities. They are currently in the process of developing £600k of additional accommodation for another 24 staff.

#### **Case Study: South Wales**

Celtic Manor is investing in its product offering and facilities. Around a quarter of a billion pounds of investment is going into the new ICC, which will support room occupancy in Celtic Manor's own hotel, as well as a number of neighbouring properties in the region, and create 1,000 jobs.

Holiday Inn Cardiff, is also growing. Last year they completed 1.2 million refurbishment of the Holiday Inn Express bedrooms. Later this year their plans include a new build of Staybridge Suites on the Site which is expected to total £9 million and add an additional 70 suites. An additional 30 positions are anticipated as a result of this investment.

<sup>9</sup> Whitbread Capital Market Day report February 2019

<sup>10</sup> <https://www.ihgplc.com/news-and-media/news-releases/2018/ihg-adds-13-luxury-and-upscale-hotels-in-the-uk>

<sup>11</sup> <http://www.hotel-industry.co.uk/data/hotel-data-industry-size/>

## **Skills**

**UK Government request:** Indicate what further commitments the Tourism and Hospitality Sector can offer on Skills.

## Skills

### A world class tourism and hospitality workforce:

Tourism and hospitality is a sector centred on great people. Developing the skilled workforce needed for the future, boosting productivity and embracing the shift to digitalisation, is a priority for businesses and is at the heart of this Sector Deal. There is a dual requirement to attract the talent that the sector needs and to develop, enhance and maintain the existing resources that it has.

#### **Industry Commitment:**

300,000 apprenticeships to be completed across Tourism and Hospitality by 2025.

A new Tourism and Hospitality Skills Board to be created, reporting directly to the Tourism Industry Council leading and reporting on the industry's work on upskilling and campaigning to attract talent.

Employers have committed £1 million of additional funding to enable an ambitious programme to revolutionise the pipeline of talent.

This work will be led by a new Tourism and Hospitality Skills Board, reporting directly to the Tourism Industry Council. This will consist of leading individuals from across the breadth of the sector, spearheaded by employers and representing all parts of the UK. This body will provide the strategic oversight for a collaborative campaign to secure a high-quality workforce.

The Board will look to be a bridge between industry and Government on skills, supporting mutual objectives to boost productivity and create high-quality jobs. It will look to Government to provide access to its structural resources in terms of access to the labour market and the education system. It will be supported by the British Beer & Pub Association and UKHospitality, working with a wide range of key sector organisations.

A partnership has already been created with DWP, through Hospitality Works, but we will look to build upon this, so the Department can confidently identify tourism and hospitality as a career of choice. The sector will work with DWP to help hard-to-reach groups into the sector, who with the right training and job readiness could thrive in our sector. This includes those on Universal Credit who may wish to work more hours and are often well suited to employment within hospitality. The Government has a role to ensure that all relevant departments are supporting the Deal, and should work to develop a future immigration policy that complements the domestic skills campaign and supports the sector.

#### **Attracting Talent**

Employers have committed over £1 million of funding to an ambitious programme to revolutionise the pipeline of talent that joins the sector. This means working in a different and more proactive way with schools, colleges, universities, JobCentrePlus, charities, hard-to-reach groups and many more.

It will combine a new digital approach to promoting the multitude of careers in the sector with more traditional routes as part of a cohesive campaign, with tourism and hospitality career showcases in business hot spots. This encompasses a substantial commitment from industry representatives to promote the sector.

Working with the Department for Education and the educational infrastructure is also critical. For those looking at their future career path the sector will work with the National Careers Service and Careers and Enterprise Company to ensure that young people are aware of the exciting opportunities that tourism and hospitality provide. This means more interaction between industry and schools and colleges. The recent establishment of a Hospitality Board for Apprenticeships will support a substantial increase in apprenticeships, provided there is flexibility from Government on how these are delivered.

With the delivery of new T-levels in catering the sector will facilitate an unprecedented number of work placements to provide school leavers a route into a profession.

Reflecting the different landscape and educational frameworks in the four nations of the UK there will be strategic direction on the Board from each country, but also structures locally to ensure that the campaign is tailored to the needs of employers. This will result in funding specifically for the nations.

### **Future-fit workforce**

#### **Case Study – Liverpool City Region is launching a new Visitor Economy Passport**

The Visitor Economy Passport provides students taking full time Visitor Economy related courses with work ready skills. It is run in conjunction with each of the Liverpool City Regions' 7 FE Colleges working in partnership with each other.

It runs at 3 levels (Bronze, Silver & Gold) and provides additional training in foreign languages, destination awareness and customer service. Dependent on which level students complete, the scheme will enable access to a job interview, apprenticeship or employment.

There are over 40 businesses who have signed the passport charter include the Liverpool Airport, Liverpool ONE, the Hospitality Association, the Arena and Convention Centre Liverpool, Knowsley Safari Park, LFC. This approach promotes greater integration between the employers, the FE Colleges and the students.

Students must secure 30 hours work experience as well as achieving minimum levels of attendance and attainment to reach the desired level. Liverpool are looking to place 200 students through the scheme by 2020.

The key to increased productivity in tourism and hospitality is the development and retention of talent within the sector. Businesses have suffered in the past from the workforce not understanding the career development that is available. A strategic approach will be taken to provide the career pathway and opportunities that employees seek from employers.

This will cover multiple elements. Ongoing training and development will be central to it. The sector has a very positive record on apprenticeship delivery but can do much more. Across tourism and hospitality the target is for 300,000 apprenticeships to be completed by 2025. These will be at all levels, covering entry-level roles, up to degree-level apprenticeships – and across a range of disciplines.

An industry mentoring programme will be developed, building on existing programmes, to support career development and signpost training and development opportunities, and identify career pathways. This will aim to support 10,000 employees each year to enhance their careers and insure they remain within the sector.

### **Improving accessibility**

The sector recognises that if it is to improve productivity and ensure a diverse and talented workforce then accessibility for both staff and customers will be key. Going forwards the sector will strive to ensure that accessibility will not be a barrier for potential employees, nor a hurdle that deters potential customers. Creating a diverse and inclusive workforce will be vital for the sector.

#### **Case Study – Bristol Airport**

An example of an area in which the airport is looking to build their skills base is in the provision of care for customers with hidden disabilities. Bristol has been recognised as ‘autism friendly’ by the Autism Society, and the customer service team has received training on other conditions including dementia and Alzheimers.

### **Positive outcomes for the sector**

The sector’s commitment, supported by Government policy, will lead to a high-quality and well-resourced workforce that will boost the UK economy through an improved tourism offer to overseas and domestic visitors, supported by a world-class hospitality industry catering to the nation.

### **Be the Business**

Be the Business was set up as a charity with funding from the UK Government in 2017 to drive up productivity across different sectors. A hospitality cluster pilot in Cornwall has been looking at improvements that can be made around management of workforce and improving overall management practice to build productivity shifts.

This work and the experience derived from it could be rolled out more widely – an obvious fit would be as part of the tourism zone delivery.

#### **Case Study – Warwickshire**

Plans are currently in place to restore Moreton Hall, Warwickshire, into a 4 star boutique hotel, which will form part of a training school for the hospitality and tourism industry. The £8.5m investment in the project will be delivered by Warwickshire College Group (WCG), an education and skills provider across Worcestershire and Warwickshire which hosts 17,000 students.

#### **Case Study – Hospitality delivering on social mobility**

In March, Greene King launched The Stepping Up Report, setting out five ambitions to encourage greater social mobility alongside a call for action for the Government and wider industry to do its part. In the report Greene King committed to train 20,000 apprentices by 2022, to begin a new recruitment programme for ex-offenders, and to increase internal appointments.

Greene King also extended its partnership with The Prince’s Trust, which helps vulnerable young people gain skills and employment. In turn, the report called for government to do its part and focus on promoting the hospitality sector as a valued career route, championing apprenticeships, and re-distributing unused Apprenticeship Levy funds.



## **Data**

**UK Government request:** What can the Sector do to share data?

## Data

### Sharing data to identify and target growth:

The UK Government asked the Sector to look at greater data sharing potential to help shape customer experiences. The UK is at the heart of the tech revolution, especially with travel businesses, and the Sector is now actively scoping the creation of a new 'Data Mining Centre' for Tourism.

#### Industry commitment

The UK Tourism sector is working with a number of global companies, including Barclay's, Airbnb, Expedia, TripAdvisor and other hotel booking platforms to discuss what data they have available and are willing to share to scope the creation of an independent 'Data Mining Centre' to help create a nationwide picture of 'Big Data' in real time.

The centre will use accurate and timely data to inform policymaking, and inform SMEs and wider industry of trends in real-time. The centre will be independent and fit alongside the British Tourist Authority's national role in publishing data and advising industry.

Technology provides tools to aid the customer journey and new ways of experiencing attractions. Smart Destinations will be a tourism demonstrator, piloted within Tourism Zones, to showcase how innovations in data and technology can improve the visitor experience and place-making.

The UK is aiming to transform the way Tourism analytics and data is used through the creation of a new, independent data-mining centre.

- The UK is a world leader in travel tech with a number of data organisations based here.
- There are currently gaps in understanding how visitors search, travel and experience the UK that 'Big Data' would help to inform and create a world class experience.
- A number of competitors are already working with telecoms companies, travel operators and national tourism agencies to create national centres for data.

Tourism has been at the heart of technological innovation. From booking flights online to the sharing economy, to social media's role at the heart of inspiration and information sharing, tourism has driven the tech revolution. The UK has considerable success at the forefront of these innovations. The world's first 'app' was developed by Orange for the Edinburgh Festival, and Skyscanner, a multi-billion-pound company was founded and based in Scotland from the early-2000s.

The modern consumer can now be understood as much through 'Big Data' as they can from consumer insights research and marketing focus grouping. The Sector is currently working to help create a combined force for data collaboration with aggregated and segmented data analytics capability from Online Travel Agents, booking platforms, banking and credit card companies and telecoms.

The British Tourist Authority, in line with its statutory duty to provide research, insights and expert advice to the tourism industry, would host the Data-Mining Centre. The BTA has the expertise to collate and interpret data, as well as the channels for communicating its findings

to the wider sector. BTA have already had discussions to begin this process with Barclays, Airbnb, Expedia, Trip Advisor, and other booking platforms.

### **Case Study: AusTrade and Tourism Australia are currently developing a data sharing facility**

Following the successful Tourism2020 strategy, in 2019 Australia's Tourism Minister launched a new consultation to build a more resilient and forward-looking tourism strategy including the creation of a new data facility.

*“Accurate and timely data and research are important tools for measuring the performance of tourism and its contribution to the Australian economy, monitoring tourism trends and informing decision-making by governments and industry. It is important to maintain the relevancy and high standards of data collection into the future. The big data landscape is growing rapidly and has significant potential to help both attract and service the visitor economy.*

*This presents the ability to aggregate and segment a range of data sources such as financials; booking websites and mobile phone data. Analysing these vast data sources can assist tourism operators and marketing bodies to better target a specific segment of the market to convert aspiration to visitation. Improvements in granularity and timeliness can also help operators adapt their product offering to meet visitors' expectations. A rigorous set of measures from real time data can influence policy and targeting of appropriate source markets.”*

### **Technology can transform destinations**

Technology and digital connectivity are changing the way people travel and how audience interact with the world around them. 85% of inbound visitors to the UK book their travel online<sup>12</sup> and 56% used location technology to find attractions whilst on holiday.<sup>13</sup>

As well as a tool to aid the customer journey, technology provides an opportunity to create new and exciting experiences. For example, the use of immersive technology, such as augmented reality and virtual reality, can help reinterpret a destination's heritage attractions for newer audiences or create an attraction around intangible assets, such as music and storytelling. Location based applications for mobile devices can guide the visitor around a destination, providing inspiration and information in their own native language.

Many of these technologies are already undergoing testing as part of the Industrial Strategy Challenge Fund, or projects run by groups such as the Transport Systems Catapult. However, these projects are not being tested as part of a destination and are divorced from their setting.

Similarly, The Challenge Fund and UK Research and Innovation are currently funding a number of projects that are relevant to tourism but have not been put in a destination context. These projects could align with Tourism Zones, enabling consumers to travel, navigate, and interact with heritage and cultural experiences, as well inform destinations and local authorities how to reach and manage visitors.

<sup>12</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight\\_151\\_-\\_booking\\_a\\_holiday\\_v2.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_151_-_booking_a_holiday_v2.pdf)

<sup>13</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight\\_152\\_-\\_tech\\_and\\_social\\_media\\_v2.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_152_-_tech_and_social_media_v2.pdf)

Smart Destination pilots, within Tourism Zones, will involve collaboration from Local Enterprise Partnerships, DMOs, universities and the tourism industry. The industry has had early discussions with UK Research and Innovation and these projects will compliment and align with the Creative Industries Sector Deal.

**Case Study: “Audiences of the Future” – Dinosaurs and Robots**

In Spring 2020, two mixed reality experiences at London’s Natural History Museum and The Science Museum will take visitors on a detective-themed trail involving interactions with virtual dinosaurs, robots and digitalised exhibits. A wholly virtual version will tour shopping centres around the UK.

The project is led by a consortium including virtual and mixed reality innovators, two UK museums, a theatre company, a university research group, a digital education company and a shopping centre group announced a pioneering collaboration to create new immersive experiences for “audiences of the future”. The project received a £4m grant from UK Research and Innovation (UKRI) and a similar figure in match funding was raised by the participants – including VR content studio Factory 42, the two museums, Sky VR Studios, and mixed reality technology company Magic Leap.

## **Accessibility**

**UK Government request:** What is the sector doing to invest in accessibility?

## Accessibility

### Building the UK's reputation as an accessible destination:

The UK tourism industry is already world-class in accessibility provision. However, more needs to be done to co-ordinate, share best practice, and tell Britain's story as a welcoming and inclusive destination. The Tourism Sector Deal will realise the UK's ambition to be the most accessible tourism industry in the world.

#### Industry commitment

The UK's tourism industry is committed to improving accessibility and factoring this into product development plans across the industry. It will continue to harmonise guidelines and share best practice, and work collaboratively to create accessible destinations.

We want to ensure accessibility is included as a matter of course in all development plans and deliver more for this important segment and the industry is committed to driving this. We will work to ensure that accessible imagery is used in marketing materials making accessibility part of Britain's brand proposition

The UK has the fundamentals to promote itself as the accessible destination of choice. UK attractions are already world class in accessibility provision, the industry will work to join up these separate investments into joined up accessible and inclusive tourism products.

Accessibility has been identified as an important aspect of the UK's tourism offering. The UK tourism industry is in many ways world-class in accessibility provision. However, more needs to be done to co-ordinate, share best practice, and tell Britain's story as a welcoming and inclusive destination.

#### Size of the market

There is a compelling business case for making tourism experiences more inclusive. One in five people in the UK have an impairment, and those with health conditions, impairments and their travelling companions spend £12 billion on trips in England each year. Currently, the domestic market makes up a significant proportion of this, with 256m day trips (worth £8.4bn) and 15.1m overnight trips (worth 3.2bn) taken by domestic tourists in England alone.<sup>14</sup>

Despite these strong figures, a proportion of Brits with an impairment still feel underserved by the tourism industry. Data in the past decade shows that almost half a million British adults cited 'lack of accessibility provision' as the reason they did not take a domestic trip in the last 12 months. By making accessibility provision a part of destination promotion, the tourism industry could generate an additional £116.7 million in domestic tourism spend.

Inbound trips to Britain taken by those with an impairment also present a further opportunity to compete for future growth, figures show 600,000 trips were made, totaling just £0.3bn spend. Added to this is the spend by an aging global demographic – visitors over 55 spent 2.3bn in the UK in 2017.<sup>15</sup>

2017 Inbound Statistics		% Change from 2016
<i>Number of Visits</i>	2.68m	+13.12%
<i>Total Expenditure</i>	2.31bn	+21.22%

Inbound holiday visits to the UK (2017), visitors aged 55+

<sup>14</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/business-hub/resources/purple\\_pound\\_infographic\\_0.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/business-hub/resources/purple_pound_infographic_0.pdf)

<sup>15</sup> <https://www.visitbritain.org/inbound-tourism-trends>

## Accessibility in UK tourism today

### Case Study: Belfast City Airport

In 2018 Belfast City Airport hosted 2.7m passengers, providing special assistance to an average of 2,000 passengers a month.

This assistance is available to passengers who are elderly, have a physical disability, or require support with social interaction and communication. The program offers additional support throughout their time at the airport, from arrival in the carpark to boarding the plane.

The airport has also introduced additional schemes to support passenger accessibility, including a lanyard system to help staff identify which passengers might need extra support, JAM (Just a minute) cards, hidden disabilities signage, Guide Dog training days, and familiarization sessions for children with Autism.

Legislation, such as the Equality Act 2010, has gone some way in mandating businesses to take steps to make their attractions, accommodation and transport options more accessible.

Many tourism product providers go beyond the legal requirements, investing additional resource in providing a high quality accessibility offer, but there is still more work to be done to ensure that Britain becomes perceived as a leader in accessible travel.

National tourist boards currently play an important role in supporting businesses of all sizes in building their accessibility credentials and promoting accessible destinations. VisitEngland offers detailed guidance on making businesses more accessible, as well as specific papers on maximising the welcome for people with Autism or hearing loss.<sup>16</sup>

Increasing product awareness is an important aspect of promoting Britain as an accessible destination. Visit Wales has produced an accessibility film, promoting some of the fantastic accessible attractions available in Wales – including surfing, falconry, and steam train trips.<sup>17</sup> Visit Wales, VisitScotland,<sup>18</sup> and VisitEngland all have dedicated web portals showcasing accessible itineraries, destinations, and experiences.

The Nation Brands Index suggests that Britain, like its competitors is not widely recognised for its accessibility credentials. In 2016 Britain scored just 25%, compared to France's 22% and Germany's 27%.

### Competitors

Competitors are using accessibility as central pillars in their marketing and in some cases make additional requirements on businesses during their accreditation awards.

VisitFlanders have a dedicated website for accessibility and produce physical brochures which detail accessible advice



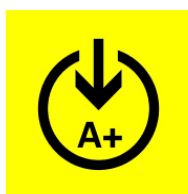
<sup>16</sup> <https://www.visitbritain.org/business-advice/make-your-business-accessible>

<sup>17</sup> <https://www.visitwales.com/explore/accessible-wales>

<sup>18</sup> <https://www.visitscotland.com/holidays-breaks/accessible/>

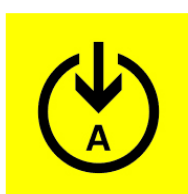
and options for those travelling with accessibility needs.<sup>19</sup> People with disabilities are also present in their social media content.

Working with industry they have also created an A or A+ designation label to indicate accessible accommodation, visitor centres, and tourist offices.



#### **The A+ label**

Buildings with the A+ label are comfortably and independently accessible for visitors with a disability.



#### **The A label**

Buildings with the A label are considered to have basic accessibility for visitors with a disability. Occasionally, extra effort or a helper may be needed. Tip: definitely find out why a building didn't score an A+.

Germany's 'BarrierFree' campaign promotes accessible routes within Germany, with online guidance booking attractions, transport options, and hotels are 'barrier free' to those with a physical disability.<sup>20</sup> This campaign is directly targeting the UK and Irish market and is supported by the German Embassies in London and Dublin, as well as their Consulate in Edinburgh.

#### **Case Study: Liverpool**

The Liverpool City region will work to become an accessible gateway with a seamless passenger journey from any entry point to the city and attractions.

Part of this vision is already being created, with a dementia awareness model that can be rolled out across the transport system in the region, and an Autism Charter which commits those who sign up to take part in training and development.

Step free access is also being rolled out across the local rail network as part of a multimillion pound investment in replacing all rolling stock commencing in 2020.

#### **The Tourism Sector Deal**

The Tourism Sector Deal presents an opportunity to realise the UK's ambition to be the most accessible tourism industry in the world.

Collaboration: The tourism industry has come together throughout the sector deal process and provided an extensive collection of best practice, case studies, and data on investment and adaptations to improve accessibility. The industry can now work together to share this experience in a more systematic way to help upscale inclusive tourism solutions. National tourist boards and DMOs will continue to promote the economic and social benefits for businesses who improve their accessibility standards.

<sup>19</sup> <https://www.visitflanders.com/en/accessibility/>

<sup>20</sup> [www.germany.travel/barrierfree](http://www.germany.travel/barrierfree)



Through the Sector Deal, the industry will facilitate discussion to standardise accessibility provisions across the UK and to work collaboratively across destinations. For example, many UK airports have already implemented successful lanyards schemes for hidden disabilities. Scoping out how to standardise the way this process works across UK airports could go some way to ensure that travelling between airports in the UK is as easy for passengers as possible.

**Making Accessibility Mainstream:** In order to tackle the issue of product knowledge the industry will commit to mainstreaming accessibility across its work.

Promoting destinations as welcoming and accessible will be a key part of Britain's brand proposition. VisitBritain will commit to increasing the visibility of people with disabilities and accessible destinations in its imagery and content, with an aim to incorporating accessibility into major ongoing campaigns such as 'I Travel For...', in order to leave lasting impressions with potential visitors about the accessible experiences that can be found in Britain.

#### **Case Study: Bath's Roman Baths**

Bath's Roman Baths, run by Bath and North East Somerset Council won a Gold Award for inclusive Tourism at the VisitEngland Awards for Excellence.

The journey to achieve these inclusivity targets began in 2007 with the roman Baths Development Plan, which set out its ambition to ensure the site is accessible physically and intellectually to all, and remains one of the UK's top attractions.

As well as having wheelchair access to 90% of the site, the Baths offer audio guides in 12 different languages, including Mandarin, that are all suitable for those with hearing-aids. Handheld devices using British Sign Language have been introduced and guides in large print and Braille are also available. Even simple measure like courtesy child carriers have transformed the visit for families.

Evening Explorer events have been introduced, creating a quieter environment for visitors with Autism to enjoy the attraction.

Staff have been trained on how to help visitors learn more about the Baths, and have also been encouraged to explore the Baths in Wheelchairs and dark glasses to help them understand the challenges facing people with disabilities.

#### **Case Study: Airbnb**

Airbnb has taken a number of proactive steps in the UK to make the platform more inclusive, creating new ways for hosts and guests to search for more accessible things to do and places to stay. In 2017, Airbnb acquired Accomable, a UK company launched to make it easier for everyone to travel, regardless of their disability. As a first step to improve the accuracy of accessible listings on the platform with the Accomable team, Airbnb launched 27 new accessibility filters and is currently piloting a free professional photography service with hosts in London to highlight accessible listing features.

Airbnb is also expanding the number of adapted Experiences on the platform - activities designed and led by locals to share their hobbies, skills, or expertise - are accessible for others. An internationally ranked player and part of the Great Britain Development Squad Suzanne leads a wheelchair tennis Experience which is open to anyone who wants to give this challenging sport a go. To consult on product changes and new initiatives, Airbnb established a UK Accessibility Advisory Board in 2018 made up of local charities and NGOs with relevant expertise.

# Industry Response

## Engagement, Case Studies, and Commitments

The UK Tourism Sector operates across every single local authority and takes in global businesses and hundreds of thousands of SMEs. The British Tourist Authority operated as the secretariat and coordinator of the deal under the leadership of Steve Ridgway CBE, Chairman of the BTA.

Roundtables were held across the UK, in each of the nations and across a number of regions helping to bring together regional commitments and a realistic and real-time level of commitment to the national deal. A new skills group was created during the course of the Sector Deal process, co-chaired by Kate Nicholls of UKHospitality and Brigid Simmonds of the British Beer and Pub Association. Simon Vincent, the co-chair of the Tourism Industry Council and Executive Vice President of Hilton worked on senior level support.

Submissions were received from every part of the UK and are included within this document.

The insights below are an impressive indication of what is being done, however much of this content was planned in the context of visitor growth, and before the uncertainty of Brexit and now a likely global economic slowdown. The Industry, like many others, is attuned to these risks and issues, and requires ongoing support to enable industry to have the confidence to invest. By announcing the Sector Deal, and showing its commitment to Tourism, the Government will keep the industry aligned and supportive of the plans the Industry itself has coalesced around.

Focus	Activity	Action
<b>1. The UK will lead Europe's hotel investment over the next 5 years</b>		
National	The UK will continue to be Europe's leading hub for hotel investment for the next five years.	<ul style="list-style-type: none"> <li>• Over 130,000 bedrooms in the pipeline, equivalent to 21% of the current bedroom stock being added.</li> </ul>
	Driving investment through increased hotel demand.	<ul style="list-style-type: none"> <li>• Tourism is a driver of investment in the UK hotel sector. 2017 the UK attracted over £5 billion in the hotel sector alone.</li> <li>• A business events strategy will bring new events and business visitors to the UK and drive UK hotel occupancy in the shoulder season.</li> <li>• Tourism Zones will promote regional spread, develop product and provide a mark of excellence to attract investment.</li> </ul>
Place-Based	Manchester is attracting hotel investment	<ul style="list-style-type: none"> <li>• Manchester has £500 million of investment currently committed to new attractions and accommodation.</li> <li>• Within the next 3 years, almost 5000 new hotel rooms are set to open across the region</li> <li>• Dalata Hotels is just one operator which has selected Manchester as a focus for further investment: with plans to build 2 new hotels and extend a third property, Dalata Hotels is creating 800 new bedrooms to add to their current 365 rooms. With an investment of almost £100million in the city region, Dalata will employ over 420 people across its hotel portfolio.</li> </ul>
	Liverpool continues to develop its accommodation offer	<ul style="list-style-type: none"> <li>• £63m invested in hotels and serviced apartments over 2018</li> <li>• £364m invested in 45 new and refurbished C1 hotels/apart-hotels since Jan 2009.</li> <li>• 7 new hotels opened, with a further 2 major hotels refurbished last year - 259 new bedrooms created and 361 serviced apartments</li> <li>• As of December 2018 there were 69 hotels/apart-hotels in the city centre, up from 37 in 2008.</li> <li>• Over 2m hotel rooms sold Jan-Dec 2018, up on 2017 figures, the average occupancy also rose to 81.8%</li> <li>• At the start of 2019 there is currently an estimated £136m worth of hotel schemes on site, that will bring 700 new rooms, 430 serviced apartments and over 250 new jobs.</li> </ul>
	Aberdeenshire's investment renaissance	The tourism and hotel sectors are an important part of the North East of Scotland's regeneration and economic diversification. This includes the £20 million investment in the Sandman Hotel, with 218 bedrooms and conferencing facilities.

The Kaleidoscope Collection is investing in Bath	The Kaleidoscope Collection has purchased the County Hotel in Bath and renamed it the Bird, adding 11 bedrooms.
Birmingham's hotel sector is continuing to expand.	<ul style="list-style-type: none"> <li>• Hilton Garden Inn at Birmingham Airport opened December 2018 + 178 rooms</li> <li>• Hotel Indigo about to reopen in Stratford upon Avon formerly The Falcon</li> <li>• Baraset Barn opening beginning of March with 12 new bedrooms</li> <li>• Dallas Burston Polo Club hotel opening later this year approx. 50 rooms</li> <li>• Mercure Shakespeare - Moving from Accor managed to Amaris Hospitality managed on 1st February, becoming a franchised Mercure hotel with new management company. Plans to develop ground floor area (refurbish) and add 19 bedrooms, as well as refurbish existing stock (no dates confirmed) with improved accessibility.</li> </ul>
Hilton in Bristol is expanding its accommodation supply.	Bristol currently has 979 bedrooms with current planning applications and a further 1,034 in the pipeline
Bristol Airport's expansion is supporting job creation	Proposals for development of Bristol Airport to handle 12 million passenger a year will create 1,000 additional jobs on site. The Airport will also be working with Business Partners (approximately 50 organisations operate on the airport site) offer a range of apprenticeships, and will be updating their Construction Framework to include a requirement for main contractors to offer an apprenticeship programme.
St Austell Brewery is investing their accommodation investment in 2019	<ul style="list-style-type: none"> <li>• 2019 forecast of £450,000 investment across 20 hotels, equating to a spend per room of £1,184</li> </ul>
Young's is increasing their investment in bedrooms year on year	<ul style="list-style-type: none"> <li>• In 2018, Young's spent £1.1m on its bedrooms. They expect to spend a similar amount in 2019, rising to £1.3m in 2020.</li> <li>• They have a total of 660 bedrooms on the estate, but have an ambition to grow by 100 rooms a year.</li> <li>• Occupancy levels are around 77%</li> </ul>

Celtic Manor is investing in their product offering in Newport.	Celtic Manor is investing in the product offering and facilities. Quarter of a billion pounds of investment is going into the new ICC, which will support room occupancy in Celtic Manor's own hotel, as well as a number of neighboring properties in the region, and create 1,000 jobs.
Shepherd Neame has invested just over £8m in the last five years on their bedrooms.	<ul style="list-style-type: none"> <li>• They expect further investment over the next 12 months of £600k</li> <li>• 294 rooms in total, with occupancy levels of 79.4%</li> </ul>
Daniel Thwaites PLC is expanding its accommodation business and investing in a Spa development at the Langdale Chase Hotel.	<ul style="list-style-type: none"> <li>• Thwaites is investment £10 million on a Spa development &amp; refurbishment scheme for Langdale Chase Hotel.</li> <li>• The company has built a new 52 bedroom Lodge adjoining the Solent hotel, Fareham for circa £5m and acquired a hotel in the Lake District. 2018/19 £5m spent on the refurbishment of the Beverley Arms.</li> <li>• Thwaites has 878 bedrooms in their hotel business (10 outlets), an additional 222 rooms in the 11 Inns of Character and circa 180 rooms in the pub estate.</li> </ul>
Twr y Felin is investing in additional rooms.	The additional 20 rooms will generate the revenue needed to sustain the luxury tourism offer in the long-term future, and will create more luxury accommodation for guests to stay in when they explore Pembrokeshire.
Holiday Inn Cardiff is investing to expand their bedroom space.	Last year Holiday Inn Cardiff completed 1.2 million refurbishment of the Holiday Inn Express bedrooms. Later this year their plans include a new build of Staybridge Suites on the Site which is expected to total £9 million and add an additional 70 suites. An additional 30 positions are anticipated as a result of this investment.
Intercontinental Hotels Group (IHG) is investing in the UK, making it the largest luxury hotel operator.	<ul style="list-style-type: none"> <li>• IHG has rebranded 12 luxury hotels in the UK, with a 13<sup>th</sup> in the pipeline, making IHG the largest luxury hotel operator in the UK.</li> <li>• This deal take IHG to more than 2 thousand rooms in the UK.</li> </ul>
Heritage buildings in Newcastle and Gateshead are being converted in Aparthotels	<ul style="list-style-type: none"> <li>• The former Felling police station building, which dates back to 1910, in Gateshead is being converted into an 18-room aparthotel. It will comprise of 13 two-bedroom and five one-bedroom apartments.</li> </ul>

		<ul style="list-style-type: none"> <li>• Lugano Property Group has started work to convert a 19th century building at Gallowgate (1-3 Gallowgate) into an aparthotel. Eight apartments each with two or three bedrooms, following a six figure investments. Lugano has appointed Dreams Apartments to manage the property.</li> </ul>
<p><b>2. The UK will be the accessible destination of choice</b></p>		
National	<p>VisitBritain will work, together with the Devolved Administrations, to share best practice on accessibility and support adaption of tourism.</p>	<ul style="list-style-type: none"> <li>• VisitEngland will work towards accessible accreditation for attractions.</li> <li>• Visit England will continue to work collectively with industry to share best practice, research and guidance</li> </ul>
	<p>The UK will be the accessible destination of choice. We will promote Britain as a welcoming and accessible tourism destination.</p>	<ul style="list-style-type: none"> <li>• Promoting Britain as a welcoming and inclusive destination for older and disabled travelers will become a key part of VisitBritain/VisitEngland's brand proposition.</li> <li>• The "Join the World" domestic campaign and the "I Travel For..." global campaign will include an accessible segments.</li> <li>• In 2016 Britain scored just 25%, compared to France's 22% and Germany's 27%. The industry will commit to increasing Britain's ranking in the Nation Brands Index by X%. This measure will demonstrate that Britain has increased its visibility as an accessible destination.</li> </ul>
	<p>Harmonising accessibility provision at UK airports.</p>	<ul style="list-style-type: none"> <li>• The tourism industry and UK airports will facilitate discussions on harmonising accessibility training and services at airports to upscale best practice and provide certainty and consistency for customers.</li> </ul>
Place-Based	<p>Belfast City Airport is providing help and assistance, free of charge, to help ensure passengers with disabilities have a less stressful journey.</p>	<ul style="list-style-type: none"> <li>• In 2018 Belfast City Airport had 2.7million passengers and Special assistance was given to approximately 2000 passengers per month.</li> <li>• For hidden disabilities the airport uses lanyards to assist passengers and to alert airport staff to their particular needs.</li> <li>• Autism in the Air: a series of 5 videos from a "child's air view" of the airport. This allows families to prepare for their travel by watching airport process, helping to alleviate the stress and uncertainty by familiarisation before the trip.</li> <li>•The airport has also set up an Accessibility Forum so that we can understand passengers accessibility needs and seek to improve how they meet these needs.</li> </ul>

<p>AirBnB is working to make its platform more accessible for hosts and guests.</p>	<p>Airbnb has taken a number of proactive steps in the UK to make the platform more inclusive, creating new ways for hosts and guests to search for more accessible things to do and places to stay. In 2017, Airbnb acquired Accomable, a UK company launched to make it easier for everyone to travel, regardless of their disability. As a first step to improve the accuracy of accessible listings on the platform with the Accomable team, Airbnb launched 27 new accessibility filters and is currently piloting a free professional photography service with hosts in London to highlight accessible listing features.</p> <p>Airbnb is also expanding the number of adapted Experiences on the platform - activities designed and led by locals to share their hobbies, skills, or expertise - are accessible for others. An internationally ranked player and part of the Great Britain Development Squad Suzanne leads a wheelchair tennis Experience which is open to anyone who wants to give this challenging sport a go. To consult on product changes and new initiatives, Airbnb established a UK Accessibility Advisory Board in 2018 made up of local charities and NGOs with relevant expertise.</p>
<p>National Trust has committed to £100million spend on infrastructure by Feb 2023, accessibility plays a part of this.</p>	<ul style="list-style-type: none"> <li>• The organisational Playing Our Part strategy has been reframed around the concept of Everyone Welcome.</li> <li>• The National Trust over has a five year programme of improving accessibility standards. This standards approach is also being applied to project work with clear expressions of intent for accessibility – for example, the inclusion of a Changing Place toilet facility in all new build visitor facility projects.</li> <li>• They will also be addressing provisions for older people in project design, including Holiday Cottages by working with specialist designers.</li> <li>• The Trust has a policy of enabling disabled people to bring a companion or carer in free of charge, or two companions/carers if they require this higher level of support.</li> </ul>
<p>Heathrow is taking steps to improve accessibility</p>	<ul style="list-style-type: none"> <li>• Heathrow investment in the service provider contract between 2019 and 2023 is projected to be £140m.</li> <li>• Heathrow is introducing new equipment and facilities to its operation, ensuring greater provision of information to prepare passengers for their journey, and providing accredited disability awareness training to airport staff.</li> </ul>

<p>The Dairy, located in the Yorkshire Dales, has recently refurbished to accommodate accessible features,</p>	<ul style="list-style-type: none"> <li>• The Dairy is presented as spacious luxury accommodation with removable accessible features which are there if you need them, but become invisible if you don't.</li> <li>• Accessible Wet rooms were installed, and the accommodation living and sleeping areas were designed with accessibility in mind.</li> <li>• Approximately 10% of overall spend was directed towards the design and inclusion of specialised equipment.</li> <li>• Cottage in the Dales is seeing a 92-96% occupancy rate. The Dairy was fully booked for the first three months before launch – based only on guests to the other cottages viewing the work in progress and viewing a floor plan of what they were trying to achieve.</li> </ul>
<p>The Accessible Derbyshire project is working to make life easier for disabled people and their travelling companions.</p>	<ul style="list-style-type: none"> <li>• The website features information about the accessible facilities available at attractions throughout the county - including all terrain wheelchairs and Changing Places toilets</li> </ul>
<p>ICC Belfast, Waterfront Hall and the Ulster Hall are accessible venues, the team continue to provide an inclusive environment for visitors, contractors, and employees.</p>	<ul style="list-style-type: none"> <li>• Drop off/ Pick up: Patrons with access requirements can request to have bollards outside ICC Belfast   Waterfront Hall lowered to allow for direct access to the main entrance</li> <li>• Lifts &amp; ramps: There is lift and ramp access across the venue, both in back of house and in the areas open to the general public. All lifts have braille notices placed inside and spoken messages indicating which floor the lift is on and whether the doors are opening and closing. All lifts also have grab bars inside</li> <li>• Escalators: Escalators serve all main floors of the building</li> <li>• Hearing impairments: Infra-Red – is available in both auditoria – is available in various locations. Customers, clients are requested to turn their hearing aid to 'T' setting. Induction Loop – is available in various locations and BSL interpreters are provided for customers upon request</li> <li>• Toilet Facilities: Accessible toilets are available for public use across the venue with grab rails, emergency pull cords, lowered mirrors and fittings.</li> <li>• Wheelchair spaces: There are dedicated wheelchair accessible spaces in the venue that are coordinated for patrons in advance by the Box Office and Operations teams</li> <li>• Assistance dogs: Assistance dogs are welcome in both venues</li> <li>• Equipment hire: A limited number of wheelchairs are available for customer use and provisions can also be made for the hire of electric wheelchairs through Shop Mobility</li> <li>• Box office/ Customer information points: Split-level counter service is available throughout the</li> </ul>



	venue	<ul style="list-style-type: none"> <li>• Carer's Policy: The venues operate a carer's policy to help customers who require essential assistance to attend events ensure equal access and opportunity</li> </ul>
	Bristol Airport	<ul style="list-style-type: none"> <li>• Bristol's customer service teams receive training on assisting customers with hidden disabilities, autism, and dementia.</li> <li>• Introduction of a 'Ramble Tag' to improve the experience of guided walking for visually impaired people.</li> <li>• Extensive building work has been carried out at their airport over the past 5 years, approximately 2% of which was allocated to accessibility (£2.5m)</li> <li>• Training and accessibility services total £100k</li> </ul>
	Stakeholders across Warwickshire is working together to create guidance for visitors with accessibility needs.	<ul style="list-style-type: none"> <li>• North Warwickshire Borough Council has partnered with AccessAble to create Accessibility Guides for 80 venues across the borough.</li> <li>• Stratford-on-Avon District Council, Warwick District Council, Royal Shakespeare Company, Shakespeare's England, Stratford and Shakespeare's Birthplace Trust partnered with AccessAble to create a new online Accessibility Checker to over 300 places across Stratford and Warwick.</li> <li>• WCC has commissioned a detailed and bespoke pilot accessibility audit of its public realm and built environment. In addition to this, the study will assess how accessible the digital welcome to each place is for visitors, i.e. local destination websites. The audits will consider aspects within the given town areas from the perspective of each type of disability.</li> <li>• WCC, in conjunction with its partners, will be using the action plans to encourage investment in short, medium and long term interventions in order to ensure town centres are accessible for all and economically supported by the Purple Pound.</li> </ul>
	Titanic Belfast has been rated one of Britain's 20 'most accessible attractions'.	<ul style="list-style-type: none"> <li>• All circulation spaces, the surrounding plaza, conference and banqueting suites and the galleries are fully accessible to all and fits in with the overall experience.</li> <li>• Guests travelling to Titanic Belfast, can arrive at the venue on foot, by car or via public transport. There is a regular service to the venue on the Belfast Glider, this is a fully accessible bus rapid transport system. Once on site, guests can enter the venue via the plaza which is fully accessible for all guests, they can make their way to any floor in the building via either the internal escalator system or the scenic lifts.</li> </ul>

		<ul style="list-style-type: none"> <li>• Whilst on site there are a number of wheelchairs which can be availed of, these can be reserved on request and are provided free of charge to guests. For those visiting Titanic Belfast with a Carer, we offer a free carers policy whereby we offer a free career ticket to any customer who requires essential assistance to visit the building.</li> <li>• The Titanic Experience is very visually striking, for those with visual impairments to complement their experience we offer a multimedia audio guide that describes the visuals internally and externally and elaborates on the text in the galleries. In addition to this, the use of bright lights, sound effects, contrasting text on panels, tactile areas, as well as narration and voiceovers, ensure that the galleries are accessible to those living with visual impairments.</li> <li>• For those with hearing loss, multi-media guides are available in state-of-the-art British Sign Language visuals. Printed versions of the guide are also available. For video presentations in the experience, transcripts of the audio of these videos are available on request.</li> <li>• Black out tents have been introduced, providing a quiet space for those with Autism, ear defenders and autism friendly wrist bands have been introduced.</li> <li>• The team have developed partnerships with Special Educational Needs schools to evaluate the offering for visits for students with additional needs to ensure these are as meaningful as possible.</li> <li>• In general throughout the recruitment process where candidates have noted that they have a disability which they would like to be taken into consideration in respect of their application for employment, we will always contact the candidate before their assessment or interview to ensure we understand their requirements and that the adjustments which we are proposing to the process are appropriate, this can include organising a BSL interpreter, allowing the candidate to be accompanied by their support worker, allowing the candidate to visit the venue the day before and see the room their interview will be in or providing a written copy of the questions rather than only verbal.</li> </ul>
	Edinburgh Airport	<ul style="list-style-type: none"> <li>• Edinburgh airport have improved their accessibility provisions, raising from poor to good in the CAA guidelines over just one year.</li> </ul>

<p>Bath's Roman Baths is improving their experience for customers</p>	<ul style="list-style-type: none"> <li>• The Roman Baths, run by Bath and North East Somerset Council won a Gold Award for inclusive Tourism at the VisitEngland Awards for Excellence.</li> <li>• The journey to achieve these inclusivity targets began in 2007 with the roman Baths Development Plan, which set out its ambition to ensure the site is accessible physically and intellectually to all, and remains one of the UK's top attractions.</li> <li>• As well as having wheelchair access to 90% of the site, the Baths offer audio guides in 12 different languages, including Mandarin, that are all suitable for those with hearing-aids. Handheld devices using British Sign Language have been introduced and guides in large print and Braille are also available. Even simple measure like courtesy child carriers have transformed the visit for families.</li> <li>• Evening Explorer events have been introduced, creating a quieter environment for visitors with Autism to enjoy the attraction.</li> <li>• Staff have been trained on how to help visitors learn more about the Baths, and have also been encouraged to explore the Baths in Wheelchairs and dark glasses to help them understand the challenges facing people with disabilities.</li> </ul>
<p>Gatwick airport has delivered a number of projects that support passengers</p>	<p>Gatwick has invested heavily of accessibility infrastructure in the last 5 years, this figure is nearly 6M of capital investment and has seen delivery of the following:</p> <ul style="list-style-type: none"> <li>- New NT PRM area</li> <li>- Relocation and expansion of ST landside PRM area</li> <li>- Changing Place installed in both terminals (airside)</li> <li>- Sensory Area (NT)</li> <li>- Kiss and Fly installation (NT drop off)</li> <li>- New assistance lanes in Gen II security</li> </ul>
<p>The Liverpool City region will become an accessible gateway with a seamless passenger journey.</p>	<ul style="list-style-type: none"> <li>• Liverpool transport partners, such as Liverpool John Lennon Airport, Merseyrail and Liverpool ONE are working together to create a seamless journey from any entry point to the city and attractions.</li> <li>• They will examine if the airport's dementia awareness training model can be rolled out across all the City Region's modes of transport.</li> <li>• There will be step free access across the Liverpool City region local rail network as part of a multi-million pound investment in replacing all rolling stock commencing in 2020.</li> </ul>
<p>Birmingham Airport is investing in infrastructure, including aspects that will improve accessibility.</p>	<ul style="list-style-type: none"> <li>• The airport's Draft Master Plan (November 2018) some £500 million of new investment to enhance facilities so they are fit for the future and provide an excellent first impression of the Midlands to all visitors.</li> </ul>

	Discover England Fund 2 accessibility project.	<ul style="list-style-type: none"> <li>• The £40m Discover England Fund (DEF) provides grants to projects which can deliver world class bookable tourism products, which join up geographies or themes, and integrate technological and transport solutions. VisitEngland is looking to secure a second round of the fund as part of the Spending Review.</li> <li>• As part of any future Discover England Fund VisitEngland will work with industry and destinations to create a project to develop products for the accessible tourism market.</li> </ul>
<b>3. Sharing industry data to identify growth opportunities in new and emerging markets</b>		
National	A Data-Mining Centre to be developed to understand national tourism data in real-time	<ul style="list-style-type: none"> <li>• The UK Tourism sector is working with a number of global companies to seek the creation of an independent 'Data Mining Centre' to help create a nationwide picture of 'Big Data' in real time.</li> <li>• The centre will use accurate and timely data to inform policymaking, and inform SMEs and wider industry of trends in real-time.</li> <li>• The centre will be independent and fit alongside the British Tourist Authority's national role in publishing data and advising industry.</li> <li>• Meetings have taken place with Barclay's, Airbnb, Expedia, TripAdvisor and other hotel booking platforms to discuss what data they have available and are willing to share.</li> </ul>
Place-based	Audiences of the Future – using immersive technology to create new and exciting experiences.	<ul style="list-style-type: none"> <li>• The Natural History Museum and The Science Museum are creating an immersive experience involving interactions with virtual dinosaurs, robots and digitalised exhibits. A wholly virtual version will tour shopping centres around the UK. This project will launch in Spring 2020.</li> <li>• The project is led by a consortium including virtual and mixed reality innovators, two UK museums, a theatre company, a university research group, a digital education company and a shopping centre group announced a pioneering collaboration to create new immersive experiences for “audiences of the future”.</li> <li>• The project received a £4m grant from UK Research and Innovation (UKRI) and a similar figure in match funding was raised by the participants – including VR content studio Factory 42, the two museums, Sky VR Studios, and mixed reality technology company Magic Leap.</li> </ul>
	Mapping customer sentiment on the UK railways.	<ul style="list-style-type: none"> <li>• The Transport Systems Catapult (TSC) is testing how to improve the customer experience in rail through sentiment mapping.</li> <li>• Collaborating with DfT, Zipabout, Transport Focus, Nottingham University and Keolis, the TSC are using sentiment analysis to measure customer experience and influence traveller behaviours. The</li> </ul>

		<p>project also overlays 2 years of operational data and sentiment analysis in a unique way to provide travellers with 'customer experience indicators' for their journey.</p> <ul style="list-style-type: none"> <li>• The project has created a demonstration tool for travellers, train operators and regulators to provide valuable journey planning, business intelligence and customer experience information.</li> </ul>
	<p>A number of Tourism Zones will be designated Smart Destinations to provide a lab to show how data and technology can improve the visitor experience and destination management.</p>	<ul style="list-style-type: none"> <li>• Smart Destinations will be laboratories that will test big data solutions, augmented and virtual reality, and AI in a destination context within Tourism Zones.</li> <li>• The Challenge Fund is currently funding a number of projects that are relevant to tourism but have not been put in a destination context. Smart Destinations will provide a platform for innovations in the way customers use technology to travel, navigate, and interact with heritage and cultural experiences, as well as how destinations and local authorities manage visitors.</li> <li>• These projects, delivered through Tourism Zones, will include support from the creative industries, LEPs and university sector.</li> </ul>
<p><b>4. Making tourism and hospitality a career for life</b></p>		
National	<p>Strategic Leadership through a new Tourism and Hospitality Skills Board.</p>	<ul style="list-style-type: none"> <li>• The Board will look to be a bridge between industry and Government on skills, supporting mutual objectives to boost productivity and create high-quality jobs. It will be supported by the British Beer &amp; Pub Association and UKHospitality, working with a wide range of key sector organisations.</li> <li>• The industry will look to build upon the Hospitality Works partnership with DWP, to help hard-to-reach groups into the sector, who with the right training and job readiness could thrive in the sector. Government has a role to ensure that all relevant departments are supporting the Deal.</li> </ul>
	<p>Attracting talent through an ambitious £1 million programme.</p>	<ul style="list-style-type: none"> <li>• Employers have committed over £1 million of funding to an ambitious programme to revolutionise the pipeline of talent that joins the sector.</li> <li>• This means working in a different and more proactive way with schools, colleges, universities, JobCentrePlus, charities, hard-to-reach groups and many more.</li> </ul>
	<p>300,000 apprenticeships in the tourism and hospitality sectors will be completed by 2025.</p>	<p>Ongoing training and development will be central to it. The sector has a very positive record on apprenticeship delivery but can do much more. Across tourism and hospitality the target is for 300,000 apprenticeships to be completed by 2025. These will be at all levels, covering entry-level roles, up to degree-level apprenticeships – and across a range of disciplines.</p>

	An industry mentoring programme	An industry mentoring programme will be developed, building on existing programmes, to support career development and signpost training and development opportunities, and identify career pathways. This will aim to support 10,000 employees each year to enhance their careers and remain within the sector.
Place-based	The Bath Pub Company has been working to improve their 'employer brand' in order to aid recruitment and retain staff	<ul style="list-style-type: none"> <li>• Redefining company values, putting them at the centre of their recruitment process.</li> <li>• Introduction of staff trips to motivate and reward staff - i.e. Chefs were sent on a foodie weekend to Barcelona.</li> <li>• They have reviewed all the touch points an employee makes from recruitment, to interview, to onboarding.</li> <li>• A new recruitment video has been produced.</li> </ul>
	The ICC Belfast, Waterfront Hall, and Ulster Hall have been developing their training programmes to upskill employees.	<ul style="list-style-type: none"> <li>• Upon appointment to a role, all staff are given the necessary training to perform the duties outlined in their job description. Event Managers and members of the wider event team are given on the job training by senior members of the team and a period of work shadowing with colleagues takes place prior to team members undertaking shifts alone.</li> <li>• Regular team and individual training sessions are provided by internal and external specialists to ensure skills are kept up to date and to ensure any changes to policies or procedures have been communicated to the team.</li> <li>• Within the Business Support department, there is a generous budget allocated to staff training. Line managers within each department are responsible for identifying and requesting training for their teams and a company-wide training plan is implemented throughout the organisation.</li> <li>• Over £40k has been spent in the past 30 months on a Leadership Development Programme for approximately 30 middle and senior managers representing an investment of approximately £1,500 per manager.</li> <li>• In 2018, all members of staff were required to complete an online training course on Disability Awareness. This course covered the general principles of disability awareness in the workplace, including the legal background and requirements that need to be met for disabled customers and employees; defining disability and types of discrimination and how to implement an effective equality and diversity policy.</li> </ul>
	My Hospitality World, Warwickshire' is an initiative that will bring local tourism and hospitality employers	<ul style="list-style-type: none"> <li>• The initiative introduces pupils to the world of work, showcases opportunities available, and inspires young people to consider a career in this rapidly growing sector.</li> <li>• WCC, in partnership with Careers Colleges, the Institute of Hospitality and Shakespeare's England, is delivering the initiative, with around 200 students aged 11-18 from 20 Warwickshire schools taking</li> </ul>

<p>together with education providers.</p> <p>The project is took place between February and March 2019, costing approx. £10,000</p>	<p>part.</p> <ul style="list-style-type: none"> <li>• 18 hotels from across the region have signed up, including Q-Hotels, The Eden Hotel Collection, Macdonald Hotels and Resorts, Hallmark, and many others. They will be offering a range of 'backstage' tours, presentations and job-shadowing opportunities to demonstrate what's on offer and spot future talent. Some of the workshops on offer include: The Taste Bud Challenge, Pizza Making, Spa Academy, The Customer Service experience and Manager in the Making.</li> </ul>
<p>Shakespeare's England is working with WCC to develop a 15 minute film promoting careers in the sector.</p>	<p>The concept for the film was developed by a group of senior managers from a range of attractions, hotels, pubs and restaurants. Shakespeare's England is also involved and the film is seen as a key piece of work as part of the Skills strand of the Destinations Management Plan it leads.</p>
<p>Plans are currently in place to restore Moreton Hall, Warwickshire, to a 4 star boutique hotel, which will form part of a training school for the hospitality and tourism industries.</p>	<ul style="list-style-type: none"> <li>• The overall cost of the project is estimated at £8.5m, with £3m currently raised and a further £3.5m being sought from the Heritage Lottery Fund.</li> <li>• The project is in partnership with Warwickshire College Group, an education and skills provider across Worcestershire and Warwickshire which hosts 17,000 students.</li> <li>• WCG is running an Industry Day for Hospitality &amp; Tourism in the Summer Term to encourage students to sign up for the new Hotel, Tourism &amp; Destination Management Diploma launching Sept 2019 and a key part of the Moreton Hall Hotel Training School.</li> <li>• In addition to the Moreton Hall investment, WCG is investing in its catering facility in Rugby, re-opening two training kitchens, with one being part of a commercial venture linked to a public restaurant on the college campus.</li> </ul>
<p>Liverpool City Region is launching a new Visitor Economy Passport</p>	<ul style="list-style-type: none"> <li>• It provides students taking full time VE related courses with work ready skills.</li> <li>• It is run in conjunction with each of the LCR's 7 FE Colleges working in partnership with each other.</li> <li>• It runs at 3 levels (Bronze, Silver &amp; Gold) and provides additional training in foreign languages, destination awareness and customer service. Dependent on which level students complete, the scheme will enable access to a job interview, apprenticeship or employment.</li> <li>• These opportunities are provided by employers who have signed the passport charter of which there are now over 40. As such it promotes greater integration between the employers, the FE Colleges and the students. This include the Liverpool Airport, Liverpool ONE, the Hospitality Association, the Arena and Convention Centre Liverpool, Knowsley Safari Park, LFC.</li> <li>• The destination awareness element has been designed and accredited by People First. Similarly,</li> </ul>

		<p>those aiming for the gold level will have access World Host (Principles of Customer Service) training (irrespective of which college they are attending).</p> <ul style="list-style-type: none"> <li>• Students must also secure 30 hours work experience as well as achieving minimum levels of attendance and attainment to reach the desired level.</li> <li>• In terms of KPIs, we are looking to place 200 students through the scheme by 2020. After the first year pilot, we have worked with 60.</li> <li>• They are now in their second year, with plans to extend the initiative out to apprenticeships and traineeships next academic year. Based on the model created to deliver the project (it is not grant funded), they are able to run the programme indefinitely.</li> </ul>
	<p>Opportunity North East, has been supporting Aberdeenshire's skills development</p>	<ul style="list-style-type: none"> <li>• The Tourism Business Game Changer programme - delivered by private sector economic development body Opportunity North East (ONE), in partnership with Scottish Enterprise - aims to support executives, managers and owners of tourism businesses in Aberdeen and Aberdeenshire to grow their business by capitalising on ongoing investment in major infrastructure and evolving consumer trends. ONE and Scottish Enterprise have developed this unique programme in partnership and by working closely with VisitAberdeenshire, the content has been designed to give participants an in-depth understanding of how to grow their business by targeting new markets.</li> </ul>
	<p>Liverpool has worked with City &amp; Guilds to develop a Global Hospitality Certification</p>	<ul style="list-style-type: none"> <li>• Liverpool will be the international pilot city for the initiative – 12 months</li> <li>• It has been designed and developed by City and Guilds to create a more comprehensive and high profile approach to accrediting the skills of current employees to support progression routes (and retention of employees) and make the sector more attractive to potential recruits.</li> <li>• At this stage, it is focussed solely on the hospitality sector working at NVQ levels 2 through to 5. It works by providing work based raining programmes meaning employees do not need to leave work to attend college. The GHC structures the learning around preset modules that are assessed and then accredited.</li> <li>• The framework sets out competency standards for the typical job roles in the industry and can be embedded into in-house training and appraisal systems used by employers. It can also be used to recognise work experience and to map work-based learning and training programmes to an international industry benchmark. There may be opportunity for to link this to the VE Passport work experience as a means of having it accredited.</li> <li>• Those involved in the scheme are Liverpool Football Club and the Liverpool Hospitality Association.</li> <li>• The KPIs/target are to issue 500 credentials over the 12 month pilot. Liverpool have invested £20k into the project.</li> </ul>



<p>Birmingham Airport is supporting young adults' skills training in the region</p>	<ul style="list-style-type: none"> <li>• The airport alone supports 30,900 jobs across the West Midlands alone, and this is projected to rise to £2.1 billion GVA and 34,400 jobs by 2033.</li> <li>• The airport work with Solihull Council on the Youth Promise Plus Programme (YPP), a flagship project funded by Birmingham City Council, Solihull Council, The European Social Fund and Youth Employment Initiative. This supports Birmingham and Solihull young people, aged 15-29 and who are 'Not in Employment, Education or Training' (NEET), towards sustainable employment or training.</li> <li>• During the FY2017/18, more than 60 YPP participants have received support in applying for a range of positions at the Airport, in security, customer service, retail, catering and ground handling. The airport also fund The Prince's Trust 'Get Into Airports' programme, a pre-employment course supporting unemployed young people. The 2017/18 programme saw 53 young people engaged, 51 completing their programmes and 39 young people offered positions at the Airport.</li> </ul>
<p>Liverpool's hotel/apart-hotel industry continues to support jobs</p>	<ul style="list-style-type: none"> <li>• There are 2,750 hotel related jobs in the city centre (1,270 of which have been created since 2008).</li> <li>• 130 hotel jobs created in 2018</li> <li>• Potential for 270 new hotel jobs to be created</li> </ul>
<p>Manchester's growing tourism product portfolio is supporting new jobs</p>	<ul style="list-style-type: none"> <li>• Estimates suggest that an additional 1million overnight stays and an additional 2million day visitors will be required within 3 years to service the new tourism facilities. This will lead to the creation of up to 18,000 new jobs at a time when the sector is already experiencing recruitment challenges and up to 50% of the apprenticeship levy remains unspent in some hotels.</li> </ul>
<p>Kaleidoscope Collection is using various techniques to retain staff at their locations</p>	<ul style="list-style-type: none"> <li>• Key management roles given an ownership stake in order to retain good employees.</li> <li>• The business pays above the industry average, and to those who deliver higher levels of productivity</li> <li>• Team members are given opportunities to expand their knowledge</li> </ul>
<p>Greene King is delivering on social mobility</p>	<ul style="list-style-type: none"> <li>• In March 2018 Greene King committed to train 20,000 apprentices by 2022, to begin a new recruitment programme for ex-offenders, and to increase internal appointments. Greene King also extended its partnership with The Prince's Trust, which helps vulnerable young people gain skills and employment. In turn, the report called for government to do its part and focus on promoting the hospitality sector as a valued career route, championing apprenticeships, and re-distributing unused Apprenticeship Levy funds</li> </ul>

	<p>Gateshead College works in partnership with local businesses to deliver apprenticeships</p>	<ul style="list-style-type: none"> <li>• The College offers Apprenticeships across the sector including in catering and hospitality, customer service, business administration, leadership and management, facilities management, health and safety amongst others all of which underpin the effective running of tourism businesses.</li> <li>• A programme ran with Sage Gateshead since 2008 has seen Apprentices placed in Sage Gateshead itself, Centre for Life, Beamish, Dance City, Northern Stage, The Customs House, Live Theatre, Museum of Hartlepool and Hartlepool Maritime Experience, Seven Stories, Bowes Museum, Arts Centre Washington and Tyne &amp; Wear Museums. The College and its partners tailor programmes to meet the very specific needs of each employer.</li> </ul>
	<p>Standardising approaches to technical education</p>	<p>Newcastle College, Gateshead College and New Durham have formed a working group to look at standardised approaches to Technical educational routes across tourism and hospitality.</p>