Pearson BTEC Level 2 Certificate in Travel Services

Pearson BTEC Level 3 Certificate in Travel Services

Specification

BTEC Specialist qualification

First teaching September 2010

Issue 3

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 3. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

These qualifications were previously known as:

Edexcel BTEC Level 2 Certificate in Travel Services (QCF)

Edexcel BTEC Level 3 Certificate in Travel Services (QCF)

The QNs remain the same.

Summary of specification Issue 3 changes for:
Pearson BTEC Level 2 Certificate in Travel Services
Pearson BTEC Level 3 Certificate in Travel Services

Summary of changes made between previous Issue 2 and this current Issue 3	Page/section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	1
TQT value added	4, 5
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	4, 5
QCF references removed from unit titles and unit levels in all units	19-221
Guided learning definition updated	13

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

BTEC Specialist qualification titles covered by this specification

Pearson BTEC Level 2 Certificate in Travel Services

Pearson BTEC Level 3 Certificate in Travel Services

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

The qualification and unit codes will appear on learners' final certification documentation.

The Qualification Numbers for the qualifications in this publication are:

Pearson BTEC Level 2 Certificate in Travel Services   500/9725/8

Pearson BTEC Level 3 Certificate in Travel Services   500/9727/1

These qualification titles will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

These qualifications are accredited by Ofqual as being part of Apprenticeships.

Welcome to the BTEC Level 2 and 3 Certificates in Travel Services

Focusing on the BTEC Level 2 and 3 Certificates in Travel Services

These qualifications are part of the Apprenticeship Framework and are suitable for learners who are working or planning to work within the travel and tourism industry as a travel consultant, overseas representative, tour operator or in the head office of a tour operator. Learners can progress to employment or to further qualifications, such as the BTEC Level 3 Nationals in Travel and Tourism, the BTEC Level 4 HNC Diploma in Travel and Tourism Management, and subsequently the BTEC Level 5 HND Diploma in Travel and Tourism Management.

Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to fit easily into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and student needs — **in this case the People 1st SSC**. Many industry and professional bodies offer successful BTEC learners exemptions for their own accredited qualifications.

All you need to get started

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Pearson vocational qualifications

- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence

- explanations of the content's relationship with the learning outcomes

- guidance on assessment, and what the learner must produce to achieve the units.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.

Contents

What are BTEC Level 2 and 3 Specialist qualifications?

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Sizes of Specialist qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)

- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)

- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

Key features of the Pearson BTEC Level 2 and 3 Certificates in Travel Services

The Pearson BTEC Level 2 and 3 Certificates in Travel Services have been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life

- achieve a nationally recognised level 2 or 3 vocationally-related qualification

- progress to employment in a particular vocational sector

- progress to related vocational qualifications.

National Occupational Standards

Where relevant, Pearson BTEC level 2 and 3 qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Pearson BTEC level 2 and 3 qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

Each unit in the specification identifies links to elements of the NOS in *Annexe C*.

The Pearson BTEC Level 2 and 3 Certificates in Travel Services relate to the NOS for Travel and Tourism.

Rules of combination

Rules of combination for the Pearson BTEC Level 2 and 3 Certificates in Travel Services

When combining units for the Pearson BTEC Level 2 or 3 Certificate in Travel Services, it is the centre's responsibility to ensure that the following rules of combination are adhered to.

Pearson BTEC Level 2 Certificate in Travel Services

1 Qualification credit value: a minimum of 17 credits.

2 Minimum credit to be achieved at, or above, the level of the qualification: 17 credits.

3 All credits must be achieved from the units listed in this specification.

Pearson BTEC Level 3 Certificate in Travel Services

1 Qualification credit value: a minimum of 22 credits.

2 Minimum credit to be achieved at, or above, the level of the qualification: 16 credits.

3 All credits must be achieved from the units listed in this specification.

Pearson BTEC Level 2 Certificate in Travel Services

The Pearson BTEC Level 2 Certificate in Travel Services is a 17-credit and 122 guided learning hour (GLH) qualification that consists of 2 mandatory units from Group A, plus optional units which are to be made up as follows, depending on the chosen pathway:

- **Leisure and Business**: a minimum of 6 credits from Group B

or

- **Tour Operators – Head Office**: a minimum of 6 credits from Group C

or

- **Tour Operators – Field Staff**: a minimum of 6 credits from Group D.

The Total Qualification Time (TQT) for this qualification is 170.

Group A — 11 credits			
Unit	**Mandatory units**	**Credit**	**Level**
1	Worldwide Travel and Tourism Destinations	10	2
2	Principles of Customer Service in Hospitality, Leisure, Travel and Tourism	1	2

Group B (Leisure and Business) — a minimum of 6 credits			
Unit	**Optional units**	**Credit**	**Level**
3	Travel and Tourism Support Services	6	2
4	Business Travel Planning	10	2
5	Travel Planning	6	2
6	UK Travel and Tourism Destinations	7	2
7	Air Fares and Ticketing	10	2

Group C (Tour Operators — Head Office) — a minimum of 6 credits			
Unit	**Optional units**	**Credit**	**Level**
5	Travel Planning	6	2
6	UK Travel and Tourism Destinations	7	2
7	Air Fares and Ticketing	10	2

Group D (Tour Operators — Field Staff) — a minimum of 6 credits			
Unit	**Optional units**	**Credit**	**Level**
3	Travel and Tourism Support Services	6	2
5	Travel Planning	6	2
8	Planning and Delivering Guided Tours	8	3

Pearson BTEC Level 3 Certificate in Travel Services

The Pearson BTEC Level 3 Certificate in Travel Services is a minimum of 22-credit and 191 guided learning hour (GLH) qualification that consists of the mandatory unit from Group A, plus optional units which are to be made up as follows, depending on the chosen pathway:

- **Leisure and Business**: a minimum of 7 credits from Group B

or

- **Tour Operators – Head Office**: a minimum of 8 credits from Group C

or

- **Tour Operators – Field Staff**: a minimum of 8 credits from Group D.

The Total Qualification Time (TQT) for this qualification is 220.

Group A — 15 credits			
Unit	Mandatory unit	Credit	Level
9	Worldwide Travel and Tourism Destinations	15	3

Group B (Leisure and Business) — a minimum of 7 credits			
Unit	Optional units	Credit	Level
5	Travel Planning	6	2
11	Travel and Tourism Destinations — England	5	3
12	Travel and Tourism Destinations — Scotland	4	3
13	Travel and Tourism Destinations — Ireland	4	3
14	Travel and Tourism Destinations — Wales	4	3
15	Air Fares and Ticketing	10	3
16	Travel Insurance	3	3
17	Arranging Business Travel	10	3
18	Special Interest Holidays and Independent Travel	7	3
10	Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism	2	3

Group C (Tour Operators — Head Office) — a minimum of 8 credits			
Unit	Optional units	Credit	Level
5	Travel Planning	6	2
16	Travel Insurance	3	3
18	Special Interest Holidays and Independent Travel	7	3
19	Principles of Marketing for Travel and Tourism	8	3
20	Development of Tour Operators' Products and Services	8	3
10	Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism	2	3

Group D (Tour Operators — Field Staff) — a minimum of 8 credits			
Unit	Optional units	Credit	Level
8	Planning and Delivering Guided Tours	8	3
19	Principles of Marketing for Travel and Tourism	8	3
20	Development of Tour Operators' Products and Services	8	3
10	Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism	2	3

Assessment

All units within these qualifications are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

To achieve a 'pass' a learner must have successfully passed **all** the assessment criteria.

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria and

- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues

- local, ie to reflect the employment context of the delivering centre

- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

In the Pearson BTEC level 2 and 3 Certificate/Specialist qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time

- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria

- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

Quality assurance of centres

Pearson BTEC level 2 and 3 Certificate/Specialist qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering the Pearson BTEC level 2 and 3 Certificate/Specialist qualifications must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment is monitored and guaranteed by Pearson.

The Pearson quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications

- approval for the Pearson BTEC level 2 and 3 qualifications and units

- **compulsory** Pearson-provided training and standardisation for internal verifiers and assessors leading to the accreditation of lead internal verifiers via the OSCA system

- quality review of the centre verification practice

- centre risk assessment by Pearson of overarching processes and quality standards

- remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities as having inadequate quality, assessment or internal verification processes.

Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

Quality Assurance Guidance

Details of quality assurance for the Pearson BTEC level 2-3 Specialist qualifications are set out in centre guidance which is published on our website (qualifications.pearson.com).

Programme design and delivery

Mode of delivery

Pearson does not normally define the mode of delivery for Pearson BTEC Entry to level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Pearson BTEC level 2 and 3 Specialist qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Pearson.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Pearson BTEC level 2 and 3 Specialist qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

Functional skills

Pearson BTEC level 2 and 3 Specialist qualifications give learners opportunities to develop and apply functional skills. Functional skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional skills are offered as stand-alone qualifications.

Access and recruitment

Pearson's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards

- they should be free from any barriers that restrict access and progression

- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

Restrictions on learner entry

The Pearson BTEC Level 2 and 3 Certificates in Travel Services are accredited for learners aged 16 and above.

Access arrangements and special considerations

Pearson's policy on access arrangements and special considerations for BTEC and Pearson NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Pearson NVQ Qualifications*, which can be found on the Pearson website (qualifications.pearson.com). This policy replaces the previous Pearson policy (Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

Each unit has the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.

- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.

- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.

- Brackets contain amplification of content which must be covered in the delivery of the unit.

- 'eg' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.

- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.

- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Pearson to offer the qualification.

- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.

Units

Unit 1: Worldwide Travel and Tourism Destinations

Unit reference number: J/601/5421

Level: 2

Credit value: 10

Guided learning hours: 72

Unit aim

The aim is to develop the learner's knowledge and skills so they can locate important tourist destinations worldwide as well as provide information needed for travel.

Unit introduction

Employees with a sound knowledge of travel geography are highly valued by employers in the travel and tourism sector. Travel agents, tour operators and tourist boards play their part in promoting worldwide travel, while visitor attractions, hospitality and transport providers develop the services and facilities that contribute to their appeal. Knowledgeable staff can make a considerable contribution to the overall success of these organisations, and having a good awareness of worldwide destinations is an excellent starting point for anyone starting out on their career in the travel and tourism sector.

In this unit learners will examine what makes destinations of the world different in their appeal. Learners will explore continents and countries, their locations and physical features, then progress to different types of destinations within them. Major tourist cities of the world will be identified, alongside those favoured for their sunshine and beaches or for winter sports. Learners will develop their knowledge of transport gateways by sea and air and the key natural and man-made attractions that help to draw tourists to different parts of the world. Learners will source essential travel information for travellers to different destinations, providing advice on climate, currency, shopping and journey times.

On completion of this unit learners will have developed their ability to use resources to locate important tourist destinations with increased confidence, and will have broadened their product knowledge of what different destinations around the world offer their visitors.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know tourism destinations of the world	1.1 Locate the continents of the world
	1.2 Locate countries of the world
	1.3 Locate capital cities and major cities worldwide
	1.4 Locate oceans, seas, gulfs and bays of the world
	1.5 Locate major physical features including mountains, mountain ranges, rivers, lakes, falls and deserts
	1.6 Locate man-made features throughout the world
	1.7 Locate islands and island groups that attract tourists throughout the world
	1.8 Locate national parks throughout the world
	1.9 Identify popular outbound tourist destinations
	1.10 Identify major seaports serving tourist destinations
	1.11 Identify major airports serving tourist destinations
2 Understand tourism destinations to inform travellers	2.1 Identify major tourist attractions
	2.2 Explain the appeal of individual tourist attractions
	2.3 Identify sun, winter sport and city destinations
	2.4 Explain the appeal of different types of tourist destinations
	2.5 Identify popular special events in relation to travel and tourism
	2.6 Identify the official language of different outbound destinations
	2.7 Identify the currencies of outbound destinations

Learning outcomes	Assessment criteria
	2.8 Explain the impact on travellers of different time zones
	2.9 Explain the most appropriate method of travelling between worldwide destinations
	2.10 Explain the types of climate found in major outbound destinations worldwide
	2.11 Identify major shops and shopping areas in outbound destinations worldwide

Unit content

1 **Know tourism destinations of the world**

Continents: Europe; North America; South America; Asia; Australasia; Africa; Antarctica

Countries: in Europe: Austria; Belgium; Bulgaria; Bosnia; Croatia; Czech Republic; Denmark; Estonia; Finland; France; Germany; Greece; Hungary; Ireland; Italy; Latvia; Lithuania; Netherlands; Norway; Poland; Portugal; Romania; Russian Federation; Serbia and Montenegro; Slovak Republic; Slovenia; Spain; Sweden; Switzerland; Turkey; United Kingdom; worldwide: Australia; Brazil; Canada; China; Egypt; India; Indonesia; Japan; Jordan; Kenya; Malaysia; Mexico; New Zealand; Peru; Singapore; South Africa; Thailand; United Arab Emirates; United States of America

Capitals: in Europe: Vienna (Austria); Brussels (Belgium); Sofia (Bulgaria); Zagreb (Croatia); Prague (Czech Republic); Copenhagen (Denmark); Helsinki (Finland); Paris (France); Berlin (Germany); Athens (Greece); Dublin (Ireland); Rome (Italy); The Hague (Netherlands); Oslo (Norway); Lisbon (Portugal); Moscow (Russian Federation); Madrid (Spain); Stockholm (Sweden); Bern (Switzerland); Ankara (Turkey); London (UK); worldwide: Canberra (Australia); Brasilia (Brazil); Ottawa (Canada); Beijing (China); Cairo (Egypt); New Delhi (India); Jakarta (Indonesia); Tokyo (Japan); Amman (Jordan); Nairobi (Kenya); Kuala Lumpur (Malaysia); Mexico City (Mexico); Wellington (New Zealand); Lima (Peru); Singapore City (Singapore); Pretoria (South Africa); Bangkok (Thailand); Dubai (UAE); Washington DC (USA)

Major cities: UK: London; Manchester; Birmingham; Liverpool; Newcastle; Bristol; Oxford; Cambridge; Southampton; Glasgow; Edinburgh; Aberdeen; Cardiff; Swansea; Belfast; Europe: Innsbruck (Austria); Bruges (Belgium); Marseilles, Lyons (France); Frankfurt, Munich (Germany); Naples, Milan (Italy); Amsterdam (The Netherlands); St Petersburg (Russian Federation); Barcelona (Spain); Zurich, Geneva (Switzerland); Istanbul (Turkey); worldwide: Sydney, Melbourne, Brisbane (Australia); Rio de Janeiro (Brazil); Toronto, Montreal, Vancouver (Canada); Shanghai (China); Mumbai (India); Auckland (New Zealand); Johannesburg, Cape Town (South Africa); New York City, Boston, Los Angeles, San Francisco, Miami, Chicago, Las Vegas (USA)

Oceans, seas, gulfs and bays: oceans: North Atlantic; South Atlantic; Pacific; Indian; Arctic; Southern; seas: Mediterranean; Red; North; Black; Caribbean; Irish; China; gulfs/bays: Mexico; Biscay; The Gulf (Persian); Bengal; Hudson

Physical features: deserts: Gobi; Sahara; Kalahari; Red Centre (Australia); mountains: Everest; Mont Blanc; Matterhorn; Snowdon; Ben Nevis; Mount Cook; Kilimanjaro; Fuji; McKinley; mountain ranges: Alps; Himalayas; Pyrenees; Andes; Rockies; Atlas; Blue Mountains; Dolomites; rivers: River Nile; Amazon River; River Rhine; River Danube; Loire; Volga; Yangtze River (Chang Jiang); Mississippi River; St Lawrence; Colorado; Murray River; lakes: Windermere; Geneva; Lucerne; Garda; Victoria; Salt Lake; Como; Winnipeg; Titicaca; Great Lakes (Michigan, Erie, Huron, Ontario, Superior); falls: Niagara (USA/Canada); Victoria (Zambia/Zimbabwe); Angel (Venezuela); natural features: Grand Canyon (USA); Great Barrier Reef, Red Centre (Australia); Table Mountain (South Africa); Sugarloaf Mountain (Brazil)

Man-made features: CN Tower (Canada): Empire State Building, White House, Golden Gate Bridge, Mount Rushmore, Statue of Liberty (USA); Christ the Redeemer (Brazil); Taj Mahal (India); Great Wall of China (China); Royal Grand Palace (Thailand); Raffles Hotel (Singapore); Imperial Palace (Japan); Machu Picchu (Peru); The Pyramids (Egypt); Sydney Opera House (Australia); Petra (Jordan); Petronas Towers (Malaysia); Robben Island (South Africa)

Islands and island groups: islands: Mauritius; Bermuda; Sri Lanka; Bali; Sardinia; Corsica; Sicily; Madeira; Malta; Cyprus; island groups: Bahamas; Caymans; Seychelles; Hawaiian; Maldives; Balearics; Canaries; Caribbean; Greek

National parks: Yosemite, Grand Canyon, Yellowstone, Everglades (USA); Masai Mara (Kenya); Kruger (South Africa); Kakadu (Australia); Dartmoor, Exmoor, Peak District, Snowdonia, Lake District, Yorkshire Dales, The Broads, Cairngorms, Pembrokeshire Coast, South Downs, New Forest, Brecon Beacons, Northumberland, North York Moors, Loch Lomond and The Trossachs (UK)

Outbound tourist destinations: Europe: Tuscany; Adriatic Riviera; Neapolitan Riviera, Italian Riviera, Italian Lakes (Italy); Costa Blanca, Costa Brava, Costa del Sol, Costa Dorada, Balearics, Canaries (Spain); Algarve, Madeira (Portugal); Tyrol (Austria); Black Forest, Rhine Valley (Germany); Côte D'Azur, Loire Valley, Vendee (France); Alps (French, Italian, Swiss, Austrian); North America: United States (Florida, California, New York City, Washington DC, New England, Las Vegas, New Orleans); Canada (Toronto, Vancouver, Canadian Rockies); Latin America: Mexico (Acapulco, Cancun); Costa Rica; South America: Brazil (Rio de Janeiro); Peru (Machu Picchu); Asia: India (Goa); China (Beijing, Shanghai, Hong Kong); Sri Lanka; Thailand (Pattaya, Phuket, Bangkok, Chiang Mai); Indonesia (Bali, Lombok); Singapore; Japan (Tokyo); Malaysia (Penang); Middle-East: Dubai (UAE); Jordan (Petra); Israel (Jerusalem); Australia/New Zealand: Australia (Sydney, Melbourne, Cairns/Barrier Reef, Perth, Darwin, Uluru/Red Centre); New Zealand (Wellington, Auckland); Africa: Egypt (Cairo, Luxor, Sharm-el-Sheikh); Kenya (Mombasa); South Africa (Cape Town, Sun City, Durban); islands: Mauritius; Bermuda; Sri Lanka; Bali; Sardinia; Corsica; Sicily; Madeira; Malta; Cyprus; island groups: Bahamas; Caymans; Seychelles; Hawaiian; Maldives; Balearics; Canaries; Caribbean; Greek Islands

Seaports: UK: Portsmouth; Dover; Southampton; Hull; Holyhead; Europe: Zeebrugge (Belgium); Calais, Le Havre, Cherbourg, St Malo (France); Dublin (Ireland); Bilbao, Barcelona, Palma (Spain); Lisbon, Oporto (Portugal); Genoa, Civitavecchia-Rome, Venice (Italy); Piraeus-Athens, Rhodes, Heraklion (Greece); Istanbul, Marmaris (Turkey); Bergen (Norway); Gothenburg (Sweden); Esbjerg (Denmark); Rotterdam (Netherlands); worldwide: Miami, Fort Lauderdale (USA); Mumbai (India); Mombasa (Kenya); Alexandria (Egypt)

Airports: UK: Belfast; Cardiff; Bristol; Glasgow; Newcastle; Manchester; Birmingham; London (Stansted, Gatwick, Heathrow, Luton); Europe: Amsterdam; Brussels; Frankfurt; Berlin; Munich; Prague; Krakow; Warsaw; Zurich; Bratislava; Budapest; Vienna; Sophia; Dubrovnik; Split; Ljubljana; Athens; Corfu; Rome; Venice; Paris; Nice; Barcelona; Alicante; Malaga; Ibiza; Palma; Mahon; Tenerife; Gran Canaria; Lanzarote; Lisbon; Faro; Funchal; Stockholm; Oslo; Copenhagen; Helsinki; Argi; Tallin; Vilnius; Istanbul; Antalya; Dalaman; Bodrum; Larnaca; Moscow; Varna; worldwide eg Chicago, Atlanta, Cancun, Tokyo, Singapore, Dubai, Mumbai, Melbourne, Johannesburg

2 **Understand tourism destinations to inform travellers**

Tourist attractions — UK: theme parks: Alton Towers; Thorpe Park; Chessington World of Adventures; Legoland; Blackpool Pleasure Beach; Pleasureland Theme Park (Southport); Drayton Manor Family Theme Park; man-made: London Eye; Tower of London; Westminster Abbey; St Paul's Cathedral; Madame Tussauds; Kew Gardens; London Zoo; Tate Modern; Victoria & Albert Museum (London); Eden Project (Cornwall); Stonehenge (Wiltshire); Blenheim Palace (Oxfordshire); Durham Cathedral (Durham); Windsor Castle (Berkshire); Roman Baths (Bath); Edinburgh Castle; Chester Zoo; Canterbury Cathedral; York Minster; Hadrian's Wall (Northumberland); Royal Pavilion (Brighton & Hove); natural: Giants Causeway; Lake District; The Broads; Snowdonia; The Highlands

Tourist attractions – European: theme parks: Disneyland Resort Paris, Parc Asterix, Futuroscope (France); Legoland, Tivoli Gardens (Denmark); Santapark (Finland); Port Aventura, WarnerBros Movieworld, Universal Mediterranea (Spain); De Efteling (Netherlands); Phantasialand, Eifelpark (Germany); man-made: Little Mermaid (Denmark); Arc de Triumphe, Eiffel Tower, Notre Dame Cathedral, The Louvre (France); Acropolis (Greece); Blarney Castle (Ireland); Colosseum, St Mark's Square, Pompeii (Italy); Anne Frank House (Netherlands); Alhambra, Prado (Spain); Blue Mosque, Ephesus (Turkey); Red Square, St Basil's Basilica, Winter Palace, Kremlin (Russian Federation); natural: Rock of Gibraltar; the Fjords (Norway); Pamukkale, Cappadoccia (Turkey)

Tourist attractions — worldwide: theme parks: Walt Disney World Resort, Disneyland, Universal Studios, Busch Gardens, Sea World Adventure Park (USA); Tokyo Disney Resort (Japan); man-made: CN Tower (Canada); Empire State Building, White House, Golden Gate Bridge, Mount Rushmore, Statue of Liberty (USA); Chichen Itza (Mexico); Christ the Redeemer (Brazil); Golden Temple; Taj Mahal (India); Great Wall of China; Terracotta Army (China); Royal Grand Palace (Thailand); Raffles (Singapore); Imperial Palace (Japan); Machu Picchu (Peru); the Pyramids (Egypt); Sydney Opera House (Australia); Petra (Jordan); Petronas Towers (Malaysia); Robben Island (South Africa); natural: Grand Canyon, Niagara Falls (USA); Great Barrier Reef, Red Centre (Australia); Table Mountain (South Africa); Iguacu Falls, Sugarloaf Mountain (Brazil)

Sun destinations: UK: Blackpool; Scarborough; Brighton & Hove; Newquay; Bournemouth; Great Yarmouth; Tenby; Llandudno; Skegness; Torbay; Europe: Torremolinos, Benidorm, Lloret, Playa de las Americas, Playa del Ingles (Spain); Rimini, Lido di Jesolo, Sorrento, Amalfi (Italy); Nice, Cannes, St Tropez (France); Albufeira (Portugal); Bodrum, Marmaris (Turkey); Faliraki (Rhodes, Greece); Kavos (Corfu, Greece); Agios Nikolaos (Crete); Ayia Napa (Cyprus); Malta; worldwide: Acapulco, Cancun (Mexico); Gulf Coast of Florida, Miami Gold Coast (USA); Penang (Malaysia); Surfers Paradise (Australia); Pattaya Beach, Phuket (Thailand); Goa (India); Banjul (Gambia); Nassau (Bahamas)

Winter sports destinations: UK and Europe eg Austria, Switzerland, Italy, France, Spain, Bulgaria, Scotland; worldwide eg Canada, USA

Appeal: tourist attractions eg education, cultural, heritage, thrill seeking, entertainment; destinations eg relaxation, price, climate, facilities, cultural, heritage, nature

Special events: eg New York St Patrick's Day Parade, New Orleans Mardi Gras (USA); Rio Carnival (Brazil); Calgary Stampede (Canada); Cannes Film Festival, Bastille Day (France); Oktoberfest, Oberammergau Passion Play (Germany); Pamplona San Fermin Festival (Spain); Notting Hill Carnival, Queen's Birthday Parade — Trooping the Colour, Edinburgh Festival, Edinburgh Military Tattoo (UK); Australia Day (Australia); Venice Carnival (Italy)

Language: eg English, French, Spanish, Italian, Portuguese, Greek, Turkish, German

Currencies: eg euro, US dollar, South African rand, Indian rupee, Thai baht, Kenyan schilling, Japanese yen, Mexican peso, Brazilian real, Turkish lira

Time zones: Greenwich Mean Time (GMT); Universal Time Co-ordinate (UTC); impacts of time zones eg jet lag

Method of travelling: air; sea; rail; roads; journeys (distance, time, method of travel)

Climate: eg polar, humid (cooler, warmer, tropical) dry, hurricane, monsoon

Shopping: shops eg Harrods (London), Galeries Lafayette (Paris), GUM (Moscow), Macy's, Bloomingdale's (New York); shopping areas eg Oxford St, Covent Garden (London), Fifth Avenue (New York), Champs-Élysées (Paris), Rodeo Drive (Los Angeles)

Essential guidance for tutors

Delivery

This unit covers destinations across the world and the content is potentially huge. The unit therefore focuses on a broad range of worldwide destinations of which an employee would be expected to have some knowledge if they were working in the industry.

Learners are likely to come from a variety of backgrounds, including those starting out in a career in the travel and tourism sector. The focus of the unit is to ensure that all learners are able to locate information on worldwide destinations and to develop a basic understanding of what different destinations have to offer.

Learners should be introduced to different resources at an early stage of delivery and should not become over-reliant on the internet as a resource. Tutors should have a range of UK, European and worldwide holiday brochures available for learners' use. Practical activities should be devised to help them become proficient and independent in using atlases, brochures, leaflets, guide books, trade manuals and websites. Learners in the workplace may have access to many of these resources.

Different approaches to delivery may be adopted. For example, some learners will work best following the unit content headings, progressing from continents and countries and then — continuing with a global approach — researching tourist cities around the world, oceans, seas, physical features, man-made features, national parks, tourist destinations, seaports, airports and so on until all elements of the unit content have been addressed. Another way would be to research each continent in turn, ensuring that all elements in the unit content have been addressed, including tourist attractions, sun destinations, winter sports and special events.

Whichever approach is adopted, workbooks or activity sheets could be devised and activities could include individual, paired or group research, quizzes and presentations. Tourist board DVDs and TV travel programmes can be used to help learners to identify the differences between tourist destinations around the world and to recognise their special features. Holiday brochures are particularly useful as they highlight the key features of different destinations and can include excellent photographs. Google Earth is excellent for adding yet another visual dimension. Learners should be able to connect key attractions to specific destinations and photo games can help to confirm their knowledge. Various online tests are available for learners to test their ability to locate countries and destinations.

The concept of time zones is not easy for some learners and will require careful explanation, supported by practical activities to appreciate day and night in different parts of the world and also the impact of travelling through time zones. Time zone maps are available in the *Columbus World Travel Guide* and online. In order to appreciate the effects of time zones, learners should be shown how to make simple calculations of times in different areas of the world using the international time calculator. There are also some excellent real-time maps available on the internet showing day and night around the world. Some learners may have travelled long haul and will be able to share experiences of the effects of jet lag.

The seasonal nature of climate in certain parts of the world should be explored. Learners could review climate charts in different types of brochures to get some idea of seasonal variations around the world, and particularly to recognise times to avoid, for example the hurricane season or monsoons. It is important that learners are able to work out the best times to travel to different areas of the world, ie where to go for guaranteed sunshine and low humidity, or for guaranteed snow for winter sports.

Pen portraits can be devised for learners to practise their ability to select suitable destinations and locate information using suitable resources. Many learners in the workplace will be dealing with such enquiries on a day-to-day basis and the unit will create additional opportunities to provide information for travellers, including currency, language, climate and shopping.

The overall emphasis is not on memorising information on a few destinations, but on being able to use resources effectively to identify and locate information on destinations around the world.

Assessment

The main focus of learning outcome 1 is for learners to show that they are able to locate tourism destinations in the world. For learning outcome 2, learners must show that they understand tourism destinations to inform travellers. These outcomes can be achieved by learners building up a portfolio of evidence over time. For practicality learners may find it easier to build up their portfolio in sections, for example by continent.

There are many different types of evidence that could be used. For example, location evidence could include blank maps on which learners have located the required aspects of the unit content. Screenshots or other downloadable evidence should be submitted to show where they have located aspects using the internet. Witness statements or observation records should be used to support any practical tasks, stating clearly how the learner has met specific criteria. These should be further supported by computer printouts, brochures or notes where appropriate. Whatever methods are used, it is essential that the evidence can be attributed to the individual learner.

Resources that would be available in the workplace may be used, as it would be unrealistic to expect learners to rely on memory when accurately locating tourism destinations around the world and finding information for travellers. The unit content is extensive and lists what must be delivered. However, for assessment purposes, the range has been limited in some cases and this is clarified in this assessment guidance.

Assessment criteria 1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 1.8, 1.9, 1.10, 1.11

For learning outcome 1, learners must demonstrate that they know tourism destinations of the world. For assessment criteria 1.1 to 1.8 the focus is on being able to locate specific features and destinations, while for assessment criteria 1.9 to 1.11 the focus is on identification. Resources may be used to assist accurate location and identification. Selections should be made from the unit content unless otherwise specified.

To achieve 1.1, learners must locate Europe, North America, South America, Asia, Australasia, Africa and Antarctica.

To achieve 1.2, learners must learners must locate twenty countries in Europe and all worldwide countries listed in the unit content.

To achieve 1.3, learners must locate capital cities in the European and worldwide countries located for 1.2, plus six major cities in the UK, six in Europe and six worldwide.

To achieve 1.4, learners must locate oceans, seas, gulfs and bays of the world as listed in the unit content.

To achieve 1.5, learners must locate major physical features including three deserts, six mountains, six mountain ranges, six rivers, six lakes, three waterfalls and three natural features.

To achieve 1.6, learners must locate ten man-made features throughout the world.

To achieve 1.7, learners must locate six islands and six island groups that attract tourists throughout the world.

To achieve 1.8, learners must locate six national parks in the UK and six worldwide.

To achieve 1.9, learners must identify popular outbound tourist destinations. For assessment purposes it is acceptable to identify three popular destinations, islands or island groups in Europe, three in North America, three in Latin/South America/Caribbean, three in Africa, three in Asia/Middle East and three in Australasia. Learners should use the unit content to select different types of destinations in a range of countries to show the scope of what is available in each geographical area.

Learners should include a brief statement to identify what makes them popular as a destination, for example 'The Tyrol is a countryside destination in the west of Austria. It is popular for winter sports and has well-known ski resorts including Kitzbühel and St Anton. The Tyrol has traditional Alpine towns and villages and is a popular destination for scenic tours and outdoor activities in spring, summer and autumn. Its main city is Innsbruck.' This could be supported by a map to show where it is located and some photographs to demonstrate its visual appeal. Alternatively, learners could use evidence gained in the workplace where they have used brochures or websites to help customers to select destinations for holidays.

To achieve 1.10, learners must identify major seaports serving tourist destinations. As a minimum, learners must identify six passenger routes between UK and European ports plus three cruise ports in Europe and three worldwide, showing an example of each within a cruise itinerary. This could be evidenced visually using maps, brochures or in workplace situations.

To achieve 1.11, learners must identify major airports serving tourist destinations. As a minimum, learners should identify the main airports serving six tourist destinations in Europe and six worldwide. They must also identify one direct route from a UK airport to each of the destinations. For example, learners could identify which airport serves the Costa del Sol (Malaga) and give an example of a direct flight from a UK airport (Manchester to Malaga). This could be evidenced in a table or visually using maps, internet sources or in workplace situations.

Assessment criteria 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 2.7, 2.8, 2.9, 2.10, 2.11

For learning outcome 2, learners must demonstrate that they understand tourism destinations to inform travellers. Many of the criteria can be achieved through practical activities, and learners who are working in travel and tourism may be able to generate evidence in the workplace.

To achieve 2.1, learners must identify major tourist attractions, and to achieve 2.2, they must explain the appeal of individual tourist attractions. Learners should identify at least two theme parks, two man-made attractions and two natural attractions in the UK, in Europe and worldwide (18 attractions in total), and then briefly explain their appeal. Learners could be asked to identify major tourist attractions from photographs and then explain their appeal. Examples should be taken from the unit content. Appeal factors could include education, cultural, heritage, thrill seeking, entertainment, relaxation.

To achieve 2.3, learners must identify sun, winter sport and city destinations, and to achieve 2.4, they must explain their appeal. Pen portraits could be written and learners should select destinations from the unit content to meet stated visitor needs, identify their location and explain briefly how they would appeal to the visitor. Appeal elements could include education, cultural, heritage, thrill seeking, entertainment, relaxation, price, climate, facilities and nature. Evidence should include three sun destinations (one in the UK, one in Europe and one worldwide), three city destinations (one in the UK, one in Europe and one worldwide), and three winter sports destinations (one in the UK, one in Europe and one worldwide). Destinations selected should be in different countries.

To achieve 2.5, learners must identify popular special events in relation to travel and tourism. They should identify six popular events, say when and where they take place and give a brief review of what each event is.

To achieve 2.6, learners must identify the official language of different outbound destinations. They could be provided with a list of outbound destinations in order to identify the official language for each. At least ten different languages should be identified.

To achieve 2.7, learners must identify the currencies of outbound destinations. They could be provided with a list of outbound destinations in order to identify the official currency for each. At least ten different currencies should be identified.

To achieve 2.8, learners must explain the impact on travellers of different time zones, showing an understanding of the effect of travelling eastwards and westwards through different time zones. Learners could be given at least four scenarios for different journeys, for example London to Singapore, New Zealand to Los Angeles, Dubai to New York and Paris to Rio de Janeiro, in order for them to explain the impact of these journeys on travellers, for example gaining/losing time, jet lag, business implications. Learners should show an awareness of GMT, UTC and time zones in their responses.

To achieve 2.9, learners must explain the most appropriate method of travelling between worldwide destinations. Different scenarios could be written to provide the opportunity for learners to explore air, rail, road and sea travel across the entirety of the evidence. Learners should explain the most appropriate method in terms of time, distance and the method of travel. For example learners could explore the options for travelling from London to Paris and London to New York, and then explain the most appropriate methods.

To achieve 2.10, learners must explain the types of climate found in major outbound destinations worldwide. They should explain what visitors might expect in at least two European and three worldwide destinations with different climatic conditions, for example Norway and Cyprus, Gulf Coast of Florida, North Queensland, Australia and Mumbai, India. Examples should be selected that will provide evidence of a range of climatic conditions such as hurricanes, tropical, monsoon.

To achieve 2.11, learners must identify major shops and shopping areas in outbound destinations worldwide. They could produce a simple poster to identify and give brief information about famous shops and shopping areas around the world, including at least five of each.

Essential resources

Learners should have access to atlases, holiday brochures, travel directories, guide books and the internet for research. Tourist board DVDs and promotional materials will be useful.

Indicative resource materials

Textbooks

Boniface B and Cooper C – *Worldwide Destinations: Geography of Travel and Tourism* (Butterworth-Heinemann, 2004) ISBN 9780750659970

Ingle S, King C, Kerr A, Jefferies M, Rock T and Spencer C (editor Woodhead V) – *BTEC Level 2 First Travel and Tourism Student Book* (Pearson, 2010) ISBN 9781846907494

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006) ISBN 9781902221939

Journals

- DG&G guides

- Trade journals such as *Travel Trade Gazette* (Reed Business Information), *Travel Weekly* (CNP Information)

Other

Holiday brochures

Websites

There are so many websites on worldwide destinations that it is impossible to provide a definitive list. Country tourist board websites will contain relevant factual and promotional information for travel to particular destinations.

earth.google.com	Google Earth
www.bugbog.com	Independent destination finder
www.fco.gov.uk	Foreign and Commonwealth Office
www.gazetteers.com	DG&G Guides
www.lizardpoint.com/fun/geoquiz	Travel geography quiz
www.lonelyplanet.co.uk	Country information and discussion boards
www.multimap.com	Online atlas
www.nationalgeographic.com/travel	Travel guide site
www.timeanddate.com/worldclock	World day and night map
www.towd.com	Tourism Offices Worldwide Directory
www.worldtimezones.com	World Time Zones
www.world-tourism.org	World Tourism Organization Statistical Service
www.worldtravelguide.net	Worldwide destination guide
www.wto.org	World Tourism Organization

Unit 2: Principles of Customer Service in Hospitality, Leisure, Travel and Tourism

Unit reference number: T/600/1059

Level: 2

Credit value: 1

Guided learning hours: 10

Unit aim

This unit will provide the introductory knowledge to customer service in the hospitality, leisure, travel and tourism sector. The unit will be appropriate for staff engaging with internal and/or external customers.

Unit introduction

Customer service is at the heart of a successful business. The hospitality, leisure, travel and tourism sector relies on excellent customer service to keep customers satisfied and to encourage repeat business. Workers in this sector need to provide excellent customer service, and in order to do this they need to understand the needs and expectations of their customers and understand how these needs are anticipated and met.

Any members of staff working in customer service in the hospitality, leisure, travel and tourism sector will be expected to present themselves in a professional way, have good interpersonal skills and be able to communicate effectively with their customers. Learners will look at the importance to the organisation of providing excellent customer service and the characteristics of excellent customer service. They will look at how this can be achieved by meeting the needs and expectations of the customers.

Learners will also develop an understanding of customers' needs and expectations as well as the factors that influence their choice of products and services. Finally, learners will examine customer complaints and how to handle them in a positive manner.

This unit underpins how employees deal with internal and external customers and has links to the level 3 unit L/600/1066: *Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism* (Unit 10 in this specification).

Through completion of this unit, learners will understand the principles of customer service and appreciate the vital role they play, as employees or potential employees of the hospitality, leisure, travel and tourism sector, in contributing to the quality of customer service.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the importance to the organisation in providing excellent customer service in the hospitality, leisure, travel and tourism industries	1.1	Describe the role of the organisation in relation to customer service
	1.2	Identify the characteristics and benefits of excellent customer service
	1.3	Give examples of internal and external customers in the industries
	1.4	Describe the importance of product knowledge and sales to organisational success
	1.5	Describe the importance of organisational procedures for customer service
2 Understand the role of the individual in delivering customer service in the hospitality, leisure, travel and tourism industries	2.1	Identify the benefits of excellent customer service for the individual
	2.2	Describe the importance of positive attitude, behaviour and motivation in providing excellent customer service
	2.3	Describe the importance of personal presentation within the industries
	2.4	Explain the importance of using appropriate types of communication
	2.5	Describe the importance of effective listening skills
3 Understand the importance of customers' needs and expectations in the hospitality, leisure, travel and tourism industries	3.1	Identify what is meant by customer needs and expectations in the industries
	3.2	Identify the importance of anticipating and responding to varying customers' needs and expectations
	3.3	Describe the factors that influence the customers' choice of products and services

Learning outcomes	Assessment criteria
	3.4 Describe the importance of meeting and exceeding customer expectations
	3.5 Describe the importance of dealing with complaints in a positive manner
	3.6 Explain the importance of complaint handling procedures

Unit content

1 **Understand the importance to the organisation in providing excellent customer service in the hospitality, leisure, travel and tourism industries**

Role of organisation: develop products; set service and quality standards; provide training; provide products and services; provide value for money; deploy staff

Characteristics of excellent customer service: staff attitude and behaviour; knowledge of products and services; compliance with quality standards; investment in training; quality of services and products; speed and accuracy of service; cost; identifying customer needs; meeting and exceeding customer expectations; working under pressure; dealing with problems; building a relationship with customers: consistency

Benefits: positive influence on organisation; increase spend; customer satisfaction; repeat business; word of mouth; customer loyalty; new customers; staff motivation; job satisfaction

Customers: internal customers (colleagues, supervisors, staff teams); external customers (existing, new, individuals, groups, suppliers, agents, business people); external customers with differing needs (non-English speaking, different ages, gender, culture, families, special needs)

Product knowledge and sales: know product; give advice; answer questions; suggest products to meet customer needs; increase sales (cross-sell, up-sell)

Organisational procedures: service standards (checking availability, booking, delivering, cancellations, payment); complaints procedure; emergency procedures

2 **Understand the role of the individual in delivering customer service in the hospitality, leisure, travel and tourism industries**

Benefits: motivated staff; increased job satisfaction; effective teamwork; staff loyalty; staff recognition; increased sales; rewards and incentives; receiving compliments; positive appraisal; improved career prospects

Customer service: ways of providing excellent customer service (positive attitude, behaviour, motivation)

Personal presentation: first impressions; personal hygiene; appearance (uniform, dress, hair, make-up, jewellery)

Communication: face to face; telephone; written; body language (posture, expression, gestures, eye contact); voice (tone, pitch, pace); language (appropriate, avoiding slang and jargon); clarity; formal and informal; adapted to meet individual needs

Listening skills: active listening; asking appropriate questions; clarifying; repeating back to customer; looking attentive; not interrupting; summarising

3 **Understand the importance of customers' needs and expectations in the hospitality, leisure, travel and tourism industries**

Customer needs and expectations: type of service (urgent, non-urgent); accurate and timely information; product knowledge; service knowledge; assistance; quality of products and services; health, safety and security; special needs (non-English speakers, hearing or sight impaired, mobility impaired, babies and young children, business equipment, gender specific); cultural considerations (special diet, social customs, dress)

Factors that influence customers' choice of products/services: price; value for money; specific needs of customer; reputation; recommendation; past experience

Customers' needs and expectations: anticipating customers' needs; responding to customers' needs; meeting customers' expectations; importance of exceeding customers' expectations; new business; repeat business; positive word of mouth recommendations

Complaints: benefit of complaint to organisation; positive manner when dealing with a complaint; need for established complaint handling procedures; consistency in complaint handling

Essential guidance for tutors

Delivery

This unit introduces learners to the principles of customer service in the hospitality, leisure, travel and tourism sector. Learners are expected to be employed or planning to be employed in the sector.

The unit gives learners an introduction to customer service and it is important to emphasise the concept of excellent customer service and the employee's role in providing it. Learners should identify the characteristics of excellent customer service. They can use their own experiences of customer service either from their jobs, from work experience, or as customers themselves in order to explore the subject in group discussions, differentiating between what constitutes poor, acceptable, good and excellent standards of service. These should be explored in travel and tourism contexts.

Learners should identify different types of customers they might encounter in their day-to-day work in travel and tourism, including both internal and external customers, and recognising in particular differing requirements relating to different cultures, ages, genders, families and special needs. Case studies could be used to help learners to recognise the differing needs of these customers and how they could meet these in terms of organisational procedures, product knowledge and sales.

Learners should be encouraged to research a variety of travel and tourism organisations to enable them to find out how customer service is provided and why it is important. This research can be undertaken with local employers, using websites of travel and tourism companies, case studies and information packs produced by major travel and tourism organisations. Centres should build strong links with employers in the sector who might supply a guest speaker on the organisation's approach to customer service and their business policies for customers. Although learners may already be employed in the industry, it would be advantageous for them to visit another business to compare and contrast different approaches to customer service and the first impressions given.

This unit gives learners the opportunity to consider their own experience as a customer or as an employee dealing with customers in this sector, looking at their own role within the organisation and how their behaviour and communication impact on customer service, either negatively or positively. As a result, learners may reflect on how they could improve their behaviour, personal presentation, communication and listening skills in order to improve the customer experience, which is at the heart of the hospitality, leisure, travel and tourism sector. Learners could discuss how they benefit from working for organisations with a strong customer service culture – this will impact on their motivation, job satisfaction, teamwork and loyalty.

Tutors should introduce learners to the skills required for customer service, including communication and listening skills, personal presentation and complaint handling. DVDs and TV programmes, such as *Airline*, can provide excellent examples of good and bad customer service and are useful vehicles for discussion. Guest speakers from various travel companies can also be asked to discuss the effects of good and poor customer service provision. From their visits and

investigations into companies, learners will have identified some of the customer types the organisation serves. Learners should be encouraged to discuss the individual needs of the different customer types and how organisations cater for specific needs.

Assessment

A portfolio of evidence could be produced to assess this unit. All learning outcomes offer the opportunity to provide examples from the workplace. Evidence may relate generally to travel and tourism organisations or to a specific travel and tourism organisation.

Evidence is likely to be in a written format, but where evidence is produced from workplace activities or discussions, witness statements or observation sheets must be used, clearly indicating how specific criteria have been met.

Assessment criteria 1.1, 1.2, 1.3, 1.4, 1.5

Learners could produce evidence for 1.1 to 1.5 in the form of a leaflet addressing these assessment criteria. Evidence for parts of this learning outcome may also be taken from group discussions where learners have contributed information, such as giving examples of internal and external customers for the industries.

Oral evidence such as this must be documented by an observation sheet recording exactly how learners have achieved specific criteria. Alternatively, video evidence could be used.

To achieve 1.1, learners must describe the role of the organisation in relation to customer service. Evidence could be in the form of a written piece of work, such as a poster or information bulletin for staff, which briefly describes at least three roles of the organisation in relation to customer service.

To achieve 1.2, learners must identify the characteristics and benefits of excellent customer service. This could be produced as a spidergram identifying at least six characteristics and six benefits.

To achieve 1.3, learners must provide two examples of internal customers, two examples of external customers and two examples of external customers with differing needs, all in a travel and tourism context.

To achieve 1.4, learners must briefly describe the importance of product knowledge and sales to organisational success, including all items listed in the unit content.

To achieve 1.5, learners must describe the importance of organisational procedures for customer service in travel and tourism. This should include a description of service standards and their importance, and the importance of procedures for complaints and emergencies.

Assessment criteria 2.1, 2.2, 2.3, 2.4, 2.5

Assessment criteria 2.1 to 2.5 could be achieved by learners producing a personal guide for effective customer service incorporating spidergrams, checklists etc, or by making a presentation on the role of the individual in delivering customer service.

To achieve 2.1, learners must identify six benefits of excellent customer service for the individual staff member.

To achieve 2.2, learners must briefly describe the importance of positive attitude, behaviour and motivation in providing excellent customer service.

To achieve 2.3, learners must briefly describe the importance of personal presentation within travel and tourism industries, including all items listed in the content.

To achieve 2.4, learners must explain the importance of using appropriate types of communication, including face to face, written, telephone and body language in travel and tourism contexts. The explanation does not have to be in depth but it should include all items in the unit content.

To achieve 2.5, learners must briefly describe the importance of effective listening skills, as listed in the unit content.

Assessment criteria 3.1, 3.2, 3.3, 3.4, 3.5, 3.6

Evidence for learning outcome 3 could come from written work or discussions where learners have contributed particular points. Evidence from discussions should be in the form of signed observation sheets or video recordings.

To achieve 3.1, learners must identify what is meant by customer needs and expectations in travel and tourism component industries. All items in the unit content should be addressed across the evidence as a whole. This could be achieved by setting pen portraits and for learners to identify the customers' specific needs and expectations. Evidence should include special needs and cultural considerations. To achieve 3.2, learners must identify the importance of anticipating and responding to varying customers' needs and expectations. This could be an extension of 3.1.

To achieve 3.3, learners must briefly describe the factors that influence the customers' choice of products and services. All items listed in the unit content should be addressed, with examples related to travel and tourism.

To achieve 3.4, learners must describe the importance of meeting and exceeding customer expectations. This should also include the importance of anticipating and responding to customer needs in travel and tourism contexts.

To achieve 3.5, learners must briefly describe the importance of dealing with complaints in a positive manner, giving simple examples to support the description.

To achieve 3.6, learners must explain the importance of complaint handling procedures and consistency in complaint handling, including how businesses benefit from complaints.

Essential resources

It is essential that learners have the opportunity to become familiar with the hospitality, leisure, travel and tourism sector. This may be through work placement, employment, visits or interviews with industry spokespersons. IT resources should be provided to allow for research.

Indicative resource materials

Textbooks

Bradley S – *S/NVQ Level 3 Customer Service* (Heinemann, 2007)
ISBN 9780435465292

Ingle S, King C, Kerr A, Jefferies M, Rock T and Spencer C (editor Woodhead V) – *BTEC Level 2 First Travel and Tourism Student Book* (Pearson, 2010)
ISBN 9781846907494

Unit 3: Travel and Tourism Support Services

Unit reference number: M/601/5445

Level: 2

Credit value: 6

Guided learning hours: 41

Unit aim

The aim of the unit is to provide the learner with a basic knowledge of both travel insurance and general travel advice.

Unit introduction

Whether booking a holiday or business trip or visiting friends and relatives, travelling overseas can be an exciting and valued experience. To ensure a safe, healthy and enjoyable trip, travellers need to be fully informed and prepared for their journey ahead. Travel agents, advisers and other travel and tourism support service personnel are required to confidently and accurately provide valid, reliable and helpful information and advice to travellers to different European and worldwide overseas destinations.

In this unit learners will be introduced to a variety of information sources where the most up-to-date information and advice for travellers can be found, including visa and passport requirements, travel health and vaccination information, safety and security advice, and foreign currency and travel insurance information.

Learners will explore how best to research the essential information that overseas travellers need, how to provide this information, and how the advice given can change depending on the destinations to be visited, world events and the types of passengers travelling.

Learners will identify the countries using the euro, along with other currencies used by non-eurozone countries. The advantages and disadvantages of different payment methods when travelling overseas will also be investigated.

Finally, learners will investigate the cover provided by the European Health Insurance Card and how this differs from a range of travel insurance policies, exploring their different terms and conditions and levels of cover.

On completion of the unit, learners should understand where to find, and how to provide, the necessary travel information and advice to overseas travellers.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand how to provide information on passport and visa requirements for overseas journeys	1.1	Identify sources of information for passport and visa requirements
	1.2	Explain passport and visa requirements for British passport holders when travelling on overseas journeys
	1.3	Explain circumstances when UK citizens may hold more than one passport
	1.4	Identify visa information required for holders of non-British passport holders when travelling on overseas journeys
	1.5	Explain the difference between tourist, business and transit visas
2 Understand how to provide health information for overseas tourist destinations	2.1	Identify sources of health information for travellers
	2.2	Explain health information for holiday destinations
	2.3	Identify the vaccinations required/recommended for tourist destinations
	2.4	Describe precautions to be taken with regard to drinking local water
3 Understand how to provide Foreign and Commonwealth Office safety and security information	3.1	Identify where to obtain Foreign and Commonwealth Office information
	3.2	Explain safety and security advice for destinations based on Foreign and Commonwealth Office information
	3.3	Explain general security precautions for overseas journeys
	3.4	Explain the purpose of the Foreign and Commonwealth Office 'Locate' register

Learning outcomes	Assessment criteria	
4 Understand how to provide foreign exchange information	4.1	Identify sources of information on foreign currency and travellers cheques
	4.2	Identify the countries which use the euro as their unit of currency
	4.3	Identify the unit of currency used in non-euro zone destinations
	4.4	Explain the advantages and disadvantages of different forms of payment when travelling overseas
	4.5	Explain the difference between 'sell at' and 'buy at' exchange rates
5 Understand how to provide information on travel insurance	5.1	Explain the importance of travel insurance to travellers
	5.2	Explain situations when travellers may require different levels of insurance cover
	5.3	Explain the difference between using an European Health Insurance Card and a travel insurance policy for medical purposes
	5.4	Outline terms and conditions that impact on the purchase of travel insurance

Unit content

1 **Understand how to provide information on passport and visa requirements for overseas journeys**

Sources of information: long-haul brochures; government websites; travel company websites

Passport and visa requirements: access to certain destinations; restrictions; special requirements; validity requirements

Circumstances: dual citizenship, due to visa administration; disqualifying stamp

Visa information: personal details (contact details, financial, employment, health, travel history); passport information; biometric data; purpose of visit

2 **Understand how to provide health information for overseas tourist destinations**

Sources of information: eg World Travel Guide, World Health Organisation, travel clinics, vaccination centre, GP, government websites

Vaccinations required/recommended: vaccinations eg malaria, polio, Hepatitis A; must have for particular destinations; advisable for particular destinations

Precautions: eg drinking bottled water, no ice in drinks, purifying water, boiling water

3 **Understand how to provide Foreign and Commonwealth Office safety and security information**

Information: Foreign and Commonwealth Office website; purpose of the Foreign and Commonwealth Office 'Locate' register

Safety and security advice: political situations; terrorism; crime; natural disasters eg hurricanes, floods; health; travel

General security precautions: airport/airline security; hotel eg using hotel safe; documents eg photocopying passports and other documents

4 **Understand how to provide foreign exchange information**

Information: sources eg bureaux de change, banks

Eurozone destinations: Austria; Belgium; Cyprus; Estonia; Finland; France; Germany; Greece; Ireland; Italy; Luxembourg; Malta; the Netherlands; Portugal; Slovakia; Slovenia; Spain

Non-eurozone currencies: dollar (USA); peso (Mexico); dollar (Canada); dollar (Australia); dollar (New Zealand); lira (Turkey); dirham (Dubai); rupee (India); dollar (Singapore); baht (Thailand); rand (South Africa); krone (Norway); franc (Switzerland); lev (Bulgaria); kuna (Croatia); leu (Romania); litas (Lithuania); lats (Latvia); koruna (Czech Republic)

Forms of payment: foreign currency; travellers cheques; credit cards; debit cards; prepaid cards; advantages and disadvantages

Exchange rates: difference between 'sell at' and 'buy at'

5 **Understand how to provide information on travel insurance**

Importance of travel insurance: protection against loss, damage, theft of baggage and belongings; payment of medical bills due to illness or accident; medical transport; repatriation; holiday cancellation; personal liability; levels of cover required for different situations; differences between European Health Insurance Card (EHIC) and travel insurance policy

Terms and conditions: pre-existing conditions; age restrictions; county of domicile; location of destination; duration of stay; members of the party; hazardous activities eg water, winter and extreme sports

Essential guidance for tutors

Delivery

This unit is designed to help learners become confident in the provision of accurate information and advice to those travelling to overseas destinations. Tutors should aim to support the delivery of the underpinning knowledge required for this unit with a range of practical and applied activities which realistically reflect the role of travel agents, specialists and support services.

Learners could initially discuss the types of information likely to be required by travellers to overseas destinations, reflecting on any of their own experiences travelling with family or friends. Different activity groups could compare and contrast initial thoughts and the reasons for any differences, such as different destinations and holiday activities.

Learners are required to identify and use a wide range of information sources in order to find out the latest advice for travellers to overseas destinations, such as visa and passport requirements, health information, safety and security advice, foreign exchange and travel insurance information. Learners should be introduced to a variety of online and traditional information sources as early as possible, and their use must be developed and reinforced throughout the unit. A range of websites from public, private and voluntary travel organisations could be explored to identify the range, scope, validity and accuracy of information on the internet. Multiple copies of travel guides and brochures could also be used in class activities, to research and identify important information for the overseas traveller.

The use of a range of case studies could be useful when learners are exploring passport and visa requirements for different countries and for different uses. Role plays could provide a practical way to explore how travel professionals provide advice on health, safety and security information for different types of traveller, to reflect their particular circumstances and needs.

It is essential that learners fully explore the official travel advice provided by the Foreign and Commonwealth Office (FCO) via their website, www.fco.gov.uk. Learners should understand the importance of this site as an essential source of accurate, valid and up-to-date travel advice to travellers and the sector.

The use of quizzes and real examples of different currencies may be useful when learners are exploring foreign exchange information. There may be opportunities for learners to develop their applied mathematical skills when investigating different forms of payment when travelling overseas, for example calculating the costs of different purchases using credit cards, debit cards or prepaid cards. A guest speaker from a local currency exchange bureau may be a useful resource in explaining the advantages and disadvantages of different payment options. Again, participating in realistic role plays set in a travel agent or exchange bureau would help learners to apply their knowledge and understanding.

The use of real life news stories may be appropriate to highlight the importance of having appropriate and adequate travel insurance when travelling abroad and may provide a useful prompt for class discussion. The level of cover provided by the European Health Insurance Card should be explored, compared with comprehensive travel insurance. Learners could take part in a quiz or competition to compare the prices of different levels of insurance cover and discuss the reasons for the increase in costs, such as cover for extreme sports, annual cover and worldwide cover.

Assessment

Within this unit, learners will need to demonstrate their knowledge and understanding of how to provide information and advice relevant to travellers to overseas destinations, including information on visas and passports, health, safety and security, foreign exchange and travel insurance.

Learners already working in travel agents or other travel and tourism support services may be able to demonstrate the knowledge and understanding required for selected assessment criteria by performing practical activities, such as identifying and using a range of information sources to research and explain information and advice to travellers. Simulated activities such as role plays may also be used for those not yet employed in a role where travel information can be provided in a 'real' environment, in order to provide opportunities for all learners to apply and demonstrate their knowledge and understanding.

Written evidence and evidence of verbal questioning may also be used to demonstrate learners' knowledge and understanding to meet assessment criteria. Where verbal questioning is used as an assessment method, a detailed record of the questions and learner responses should be provided as part of an individual observation record, signed and authenticated by both the learner and assessor.

Examples of assessment activities are provided below.

To achieve criteria 1.1 and 1.2, learners could identify sources of information and explain visa and passport requirements by completing an observed role-play scenario, using at least two different sources of visa and passport information, in dealing with travellers to at least two different overseas destinations.

To achieve criteria 1.3, 1.4 and 1.5, learners could produce a written piece of evidence, such as an information booklet for new staff which identifies all the content range listed for visa information, explains the differences between different visa types and explains the circumstances when UK citizens may hold more than one passport.

To achieve criteria 2.1, 2.2, 2.3 and 2.4, learners could produce a traveller information leaflet which identifies at least three sources of health information for travellers, explains the vaccinations which are both required (must have) and recommended (advisable) for travelling to at least two different overseas tourist destinations and describes precautions to be taken with regard to drinking local water.

To achieve criteria 3.1 and 3.2, learners could identify where to find Foreign and Commonwealth Office information and explain safety and security advice, by completing an observed role-play scenario dealing with travellers to at least two different overseas destinations. Information covering all essential content range should be included.

To achieve criteria 3.3 and 3.4, learners could create and deliver a presentation which explains all the essential content range relating to general security precautions for overseas journeys and explains the purpose of the FCO 'Locate' register.

To achieve criteria 4.1, 4.2 and 4.3, learners could identify sources of information on currency and travellers cheques and use these to identify the countries which use the euro as their unit or currency. Maps could be used to highlight these countries and to identify the unit of currency used in all the non-eurozone destinations listed in the content range.

To achieve criterion 4.4, learners could explain the advantages and disadvantages of all the different forms of payment when travelling to overseas destinations, by completing a written piece of evidence which covers all the listed content range.

To achieve criterion 4.5, learners could explain the difference between 'sell at' and 'buy at' exchange rates through verbal questioning, supported by a record of the response given.

To achieve criteria 5.1, 5.2, 5.3 and 5.4, learners could produce a written or multi-media resource for travellers which explains the importance of travel insurance to travellers, the situations when travellers may require different levels of insurance cover, the difference between using a European Health Insurance Card and travel insurance for medical purposes and provides an outline of the terms and conditions that impact on the purchase of travel insurance. All the content range listed should be covered in the evidence produced.

Tasks which cover all the assessment criteria may be presented as one assignment brief. Evidence for multiple assessment criteria may be demonstrated by learners through the same role-play scenarios, for example 1.1, 1.2, 3.1 and 3.2.

Essential resources

Computers, internet, travel guides, brochures.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

World Travel Atlas (Columbus Press, annual)

World Travel Guide (Columbus Press, annual)

Ingle S, King C, Kerr A, Jefferies M, Rock T and Spencer C (editor Woodhead V) – *BTEC Level 2 First Travel and Tourism Student Book* (Pearson, 2010) ISBN 9781846907494

Ingle S, King C, Rock T and Spencer C (editor Woodhead V) – *BTEC Level 2 First Travel and Tourism Teaching Resource Pack* (Pearson, 2010) ISBN 9781846906312

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

www.abta.com	The Travel Association
www.caa.co.uk	UK Civil Aviation Authority
www.ehic.org.uk	European Health Insurance Card (EHIC)
www.fco.gov.uk	Foreign and Commonwealth Office
www.ips.gov.uk	Identity and Passport Service
www.nathnac.org	National Travel Health Network and Centre
www.nhs.uk/healthcareabroad	NHS Healthcare Abroad
www.people1st.co.uk	People 1st – Sector Skills Council for Hospitality
www.ttglive.com	*Travel Trade Gazette*
www.who.int/ith	World Health Organisation
www.worldtravelguide.net	*World Travel Guide*

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Unit 4:   Business Travel Planning

Unit reference number: L/601/5422

Level: 2

Credit value: 10

Guided learning hours: 62

Unit aim

The aim of this unit is to provide the learner with the skills and knowledge necessary to gain employment in a business travel centre or other business travel environment.

Unit introduction

Business travel is a prestigious and valuable sector of the travel and tourism industry. The income generated from this sector is year round, and business travel companies have evolved over recent years from agents to travel management companies. Throughout this unit learners will develop an understanding of business travel management by exploring reasons for corporate travel and the many different roles of travel management companies as specialist consultants.

Learners will develop an understanding of how information technology is used in business travel and will gain knowledge of the specialist global distribution systems available.

Destination and transport knowledge is key to providing an efficient service to clients and being able to make alternative arrangements at short notice. Learners will develop their knowledge of business destinations, transport routes and the effects of time differences on travellers.

As corporations seek to reduce costs, travelling on discounted air fares is commonplace and learners will need to understand the restrictions of discounted fares. Learners will become familiar with the full range of services available to business travellers, and the associated terminology.

Finally, learners will practise the planning and construction of business traveller itineraries in accordance with requests from clients, and will develop an awareness of corporate travel policies.

The unit provides an insight into this fast-paced and exciting sector of the travel industry and will prepare learners for work at a junior level within a travel management company.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the role of travel management companies	1.1	Explain the definition of the term business travel
	1.2	Explain the reasons why people travel on business
	1.3	Explain the differences between the business and leisure travel sectors
	1.4	Identify travel management companies
	1.5	Explain the role of travel management companies
2 Understand how information technology is used in business travel	2.1	Identify information technology used to retrieve information on business travel services
	2.2	Explain the main uses of information technology in business travel
	2.3	Identify the Global Distribution Systems (GDS) available for business travel
	2.4	Explain the main functions of a typical Global Distribution System
	2.5	Explain the different forms of technological communication used in business travel
	2.6	Explain the need for security and safety of client's information stored in a computer
3 Know business travel destinations	3.1	Locate business travel destinations
	3.2	Explain the importance of travel information to business travellers
	3.3	Identify major business transport routes in and from the UK
	3.4	Identify time differences between the UK and other countries
	3.5	Explain the effect of time changes in relation to business travellers

Learning outcomes	Assessment criteria	
4 Understand published and discounted air fares	4.1	Explain the differences between scheduled and charter flights
	4.2	Explain the differences between standards of service
	4.3	Describe the ways in which published fares on scheduled services can be offered at discounted prices
	4.4	Identify discounted air fares to a named business travel destination
	4.5	Explain the terms and conditions for a selected fare
	4.6	Explain the advantages and disadvantages of a selected fare
5 Know travel services for the business traveller	5.1	Identify terminology associated with self-drive vehicle rental
	5.2	Explain the use of vehicle rental vouchers
	5.3	Identify terminology associated with accommodation
	5.4	Identify information on accommodation types
	5.5	Explain different methods of guaranteeing accommodation reservations
	5.6	Identify information on rail travel booked in the UK
	5.7	Identify suppliers operating vehicle and passenger carrying services from, to, and within the UK
	5.8	Describe the on-board facilities available to business travellers on vehicle and passenger carrying services from, to, and within the UK
	5.9	Identify documentation and equipment required for journeys by UK registered vehicles outside the UK

Learning outcomes	Assessment criteria	
6 Know ancillary travel support services for the business traveller	6.1	Explain circumstances when UK citizens may hold more than one passport
	6.2	Explain visa requirements for UK citizens travelling from the UK
	6.3	Explain the health requirements for UK citizens travelling from the UK
	6.4	Explain the reciprocal health arrangements available through the European Union
	6.5	Identify sources for obtaining foreign currency and travellers cheques
	6.6	Describe different methods of paying for foreign currency and travellers cheques
	6.7	Explain the differences between credit, debit and charge cards
7 Be able to plan and construct business travel itineraries	7.1	Select transport options/routes for a given itinerary
	7.2	Select accommodation and self-drive vehicle rental as required
	7.3	Prepare business travel itineraries
	7.4	Identify items listed in a Corporate Travel Policy
	7.5	Identify the components needed to construct an itinerary for a business traveller
	7.6	Identify transfer options from points of arrival to destinations

Unit content

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1 **Understand the role of travel management companies**

Business travel: definition; reasons why people travel on business eg meetings, seminars, conferences, commercial exhibitions, sales, training, maintenance trade shows, consultancy

Differences between business and leisure travel sectors: eg needs of corporations; traveller profiles; destinations; expenditure; flexibility of arrangements; urgency; priority; corporate travel policies; corporate rates; transaction and management fees; payment terms

Travel management companies: specialist business travel agency; mixed business and leisure agency; UK independent; multinational; members of business travel associations eg Guild of Travel Management Companies (GTMC), Advantage Business Travel Focus Group

Role of travel management companies: providing travel solutions and advice; training of client travel arrangers; consultancy; providing professional service and meeting service agreements; industry representation; negotiation of rates on behalf of client; liaison with suppliers and clients

2 **Understand how information technology is used in business travel**

Retrieving information: systems (Global Distribution System, internet, intranet); information to be retrieved (company and traveller profiles, checking availability, obtaining schedules, costing fares and securing corporate rates, making reservations)

Main uses of information technology: communication with clients and suppliers eg email; arranging travel eg using GDS; administration of the organisation eg invoicing; reporting of financial data and profitability eg records

Global Distribution Systems (GDS): systems (Amadeus, Galileo, Sabre, Worldspan); functions (checking availability, obtaining fares, making reservations, ticketing, meeting special requirements, maintaining company and traveller profiles)

Technological communication: telephone; GDS; email; internet; intranet; extranet; facsimile

Security and safety of client information: data protection; professional conduct; client confidentiality

3 **Know business travel destinations**

Business destinations: UK; European; worldwide

Importance of travel information: traveller preparation; terms and conditions of reservations in case of cancellation, changes, postponement and delay; climate; currencies; language; clothing; relevant business and social practices; local customs allowances; personal safety and security

Major business transport routes: in and from the UK; including major air, sea and rail gateways; motorways; land-border crossings; vehicle carrying routes

Time differences and changes: ahead or behind UTC/GMT; clocks put forward (daylight saving) or back; gaining and losing time; international date line

4 **Understand published and discounted air fares**

Differences between scheduled and charter flights: frequency of flights; flexibility of tickets; price; standards of service (no frills, full service, economy, premium class, business class, first class); classes of travel; destinations and routes

Discounted air fares: ways in which can be offered at discounted prices (consolidators, travel management companies' own negotiated fares, airline special fares department, internet)

Discounted air fares to a named business destination: price of air fares; rules and regulations

Selected air fare: terms and conditions *(*minimum stay, maximum stay, midweek or weekend travel, time of day, ticketing, cancellations refunds, changes to bookings, stopovers, flight restrictions, penalties); advantages and disadvantages of selected fare (price, flexibility, restrictions, advance booking, availability, cancellation policy, refunds, standards of service)

5 **Know travel services for the business traveller**

Terminology associated with self-drive vehicle rental: car groups; rental periods; corporate rates and discounts; loyalty and membership cards; legal requirements (eg age limits, endorsements on license); collision damage waiver; personal accident insurance; personal liability insurance; cost/pricing structures (all inclusive, time and mileage, unlimited mileage, mileage charges, drop-off charges, one-way rentals, delivery charges)

Vehicle rental vouchers: referral; full credit; specified; prepaid

Terminology associated with accommodation: full board; half board; room only; bed and breakfast; 24 hour rate; day delegate rate; facilities provision; rack rate; corporate rate; promotional rate; client negotiated rate (eg due to regular bookings); group rate

Accommodation types and information: hotel; apartment; conference or meeting room; location; rates; classification; number of rooms; types of private facilities; public facilities; business and conference facilities; commission rates; check-in and check-out times; room release and cancellation policy

Methods of guaranteeing accommodation reservations: corporate credit card; personal credit card; business travel company IATA number or account number

Information on rail travel in the UK: schedules; change points; routes; class; accommodation; fare types; rail cards (senior and young persons); business traveller packages; on-board facilities; station facilities

Vehicle and passenger carrying services from, to and within the UK: suppliers (ferry, catamaran, train) eg Sea France, Eurostar; facilities on-board (cabins, berths, seats, lounges, restaurants, bars, cinemas, shops, exchange bureau, purser's office

Documentation and equipment required for journeys by UK registered vehicles outside the UK: passports; tickets; vouchers; green card insurance; driving license; vehicle registration documents; GB sticker; spare bulbs; headlamps; warning triangle; first aid kit; high visibility jacket

6 **Know ancillary travel support services for the business traveller**

Passports and visas: circumstances when UK citizens may hold more than one passport (dual nationality, carrying separate passport with valid visa, second passport being processed for a visa, visiting 'sensitive' country); visa requirements for UK citizens travelling from the UK (single entry, multi-entry, transit); countries requiring UK citizens to obtain a visa prior to travelling eg China, Australia

Health requirements and agreements: compulsory health requirements eg vaccination certificates; recommended eg vaccinations, malaria tablets; reciprocal health arrangements available through the European Union (EHIC or equivalent)

Foreign currency: sources eg specialist supplier, bank, bureau de change, internet, retail shops; methods of paying for foreign currency and travellers cheques eg cash, cheque, invoice, direct debit, credit cards, debit cards, charge cards

Differences between credit, debit and charge cards: application processes for each card; limitations; billing; fees; terms; protection; reward schemes; acceptance

7 **Be able to plan and construct business travel itineraries**

Plan and construct business travel itineraries: written plan for business travel journeys (within the UK, from the UK and within Europe)

Transport options/routes: types (air; rail; road; sea); other eg non-stop, direct, indirect, transfer connection, stopover; alternative flights and routes eg different day/date, different carrier, different business travel destination, different routing

Transfer options: eg rail, bus, coach, taxi, courtesy transport provided between airport and city centre

Corporate travel policy: authorised travellers, authorised travel arrangers/bookers; authorisation procedures; permitted class of travel; preferred suppliers (airlines, hotels, car rental)

Components needed to construct an itinerary: transport; accommodation; vehicle rental; transfers; special requirements; suppliers; forms of payment; airline route deal information; information on client negotiated rates for car rental and hotels

Essential guidance for tutors

Delivery

This unit may be delivered in the workplace, as part of a work placement or in a simulated setting in a school or college. Due to the technical nature of travel management, it is recommended that learners have access to a tutor with relevant experience of the business travel sector. This unit is intended to give learners an understanding of the role of travel management companies in relation to corporations and individual business travellers. Learners will develop knowledge of destinations and the specific services provided. Whenever possible, tutors should provide learners with suitable contexts to support learning, for example through scenarios and the use of relevant media and template documents. Learning activities should also aim to develop relevant skills for working in this sector, such as good organisation, the ability to work under pressure, and professional communication skills.

To begin the unit, tutors could give learners pen portraits and images of well-known corporations and ask learners to identify reasons for business travel. This could range from high street retailers to global banks and should be a fun session to engage learners and create an interest in the subject. Once the reasons for business travel have been established, learners will need to appreciate the significant differences between the business and leisure sectors. 'A day in the life' case studies of business and leisure travel consultants could provide a sound basis for discussion of the key differences. Learners could also assume the role of corporate employees travelling for business and start to identify specific requirements. Tutors will need to explain the reasons for corporate travel policies, and it is recommended that a speaker from the relevant department (such as finance) within the centre could provide examples to support learning. This topic is revisited in more detail during learning outcome 7.

Travel management companies range from small independent agencies, where business travel is only a proportion of sales, to global travel management companies. It would be beneficial for learners to undertake guided research tasks into the different types of travel management companies and the services they provide to their clients. A good starting point would be for learners to visit the website of the Guild of Travel Management Companies, as information is provided on the role of travel management companies and links are given to websites of well-known travel management companies such as Carson Wagonlit. If possible, a guest speaker from a travel management company would enhance the delivery of learning outcome 1. If a guest speaker is not possible, tutors must emphasise the fact that travel management companies are much more than just agents, and these days more revenue is earned from consultancy, negotiation and providing financial feedback than for simply making reservations; this is mainly due to suppliers reducing commission and travel management companies needing to evolve. Learners could also be given job descriptions for business travel positions in order to build up an appreciation of the role of travel management companies.

Following on from the role of travel management companies, learners will need to appreciate the central importance of information technology in supporting these organisations to fulfil their roles. Learning outcome 2 requires learners to develop a clear understanding of the different uses of information technology and specifically the functions of global distribution systems. Tutors will need to break

down the different uses of information technology into sections in order to support learners in understanding the many different uses. To show learners how information is retrieved, tutors could provide a simulated electronic travel request from a client and learners could work in pairs to identify how the relevant information could be retrieved. Learners could then be tasked with sourcing basic transport options (such as flights and car hire) on the internet. Learners would benefit from applying their knowledge to a range of different scenarios and requests in order to ensure they understand how information technology is used. When exploring the main uses of information technology, tutors could separate the uses into reservations and administration and relevant images would support this.

If possible, a guest speaker or a visit to an organisation to view a Global Distribution System (GDS) in operation would be beneficial. A good summary of the different GDS can be located on the internet, and it would be helpful if tutors could provide an insight into basic entry commands when using a GDS, or introduce basic IATA airport codes. In order for learners to understand the different forms of technological communication, tutors could communicate tasks using the various forms and ask the learners to respond accordingly. To conclude learning outcome 2, tutors should explain the need for security and safety of clients' information. This could be explored through learners identifying the type of customer information held by travel management companies and then discussing the consequences of insecure systems.

To gain the required knowledge for learning outcome 3, learners could assume the role of a business travel consultant and respond to simulated client requests. This research and enquiry could form the basis of a discussion of how consultants source information quickly for their clients and how this information is important for individual travellers. It is recommended that learners become familiar with using an atlas and practise locating destinations. There are many online travel destination games which would support the delivery of this learning outcome. The concept of time differences can be explained visually by using a globe, and learners could practise by identifying countries that are ahead of and behind GMT. Tutors should initiate discussions of the effects of time changes on business travellers, and learners should explore the effects associated with travelling to long-haul destinations.

It is now more commonplace for corporations to seek discounted air fares for individual travellers as businesses seek to cut costs. Travel management companies need to be expert in selecting and offering suitable air fares according to the needs of the business and the nature of individual business trips. Discounted air fares are more restricted in contrast with full price, business and first class ticket conditions and this should underpin the delivery of learning outcome 4. Tutors should provide business trip scenarios that illustrate when and why different types of airlines and air fares would be most suitable, and learners should focus on comparing cost versus flexibility while doing so. Tutors will need to explain the different ways in which fares are available at discounted prices. When selecting specific air fares, the internet would provide the most accessible source (eg www.opodo.co.uk). It is useful to explain the importance of studying the *Air Fares and Ticketing* units in conjunction with this unit and for learners to appreciate that those employed within the business travel industry usually have achieved the IATA Air Fares and Ticketing examinations.

Learners need to become familiar with the terminology specific to business travel services and fully explore the range of services available. In a working environment employees would need to be fluent in this terminology, and it is recommended that tutors check the knowledge of learners, which could be done through quizzes and gapped handouts. Tutors will need to explain the use of vouchers as payment and confirmation for car rental as a convenient service for business travellers.

When researching accommodation types and information, learners will need to understand the methods by which rooms are guaranteed and the implications of not cancelling rooms which are no longer required. Tutors must make the position of the travel management company clear as an intermediary between clients and suppliers. Tutors could provide learners with a client request for rail travel that requires all the information available to be provided.

Vehicle carrying services is a large topic and tutors will need to allow time for learners to research the different suppliers for travel from, to and within the UK. Learners should research the on-board facilities available for ferry operators and compare this with catamaran services and Eurotunnel. Tutors could facilitate a discussion of instances when business travellers may select different vehicle carrying services, to ensure learners have good knowledge of the full range of services available. Travel management companies need to keep up to date with regulations and requirements for taking UK registered vehicles overseas in order to inform clients. Learners can research this information from the AA website or the various Eurotunnel and ferry supplier websites. Tutors will need to emphasise that countries such as France have strict regulations relating to compulsory equipment that must be carried by drivers, and failure to comply can result in on-the-spot fines.

Learners will need to develop working knowledge of the ancillary travel support services provided to business travellers. Travel management companies keep records of traveller passport and visa details as part of the traveller profile and to support travellers in ensuring they have the correct and valid documentation for travel. If possible, it would be useful to show learners a passport with a current visa to facilitate their understanding, alternatively images can easily be sourced on the internet. Tutors will need to explain the various circumstances when more than one passport may be held by a UK citizen and place this in the working context of a business travel consultant. Learners could research the different types of visas required by UK citizens when departing from the UK to different countries. As part of the service provided to clients, travel management companies should advise travellers on the relevant health requirements for travelling outside of the UK; learners can research current information using the internet, including www.EHIC.org.uk. Foreign currency can now be obtained from a wide range of organisations and learners could investigate the different sources: online, physical retailers and outlets at airports, ports, and international rail terminals. The different ways in which business travellers pay for services while travelling should be discussed, and as a group activity learners could identify the differences between credit, debit and charge cards. As this is a knowledge-based outcome, learners do not need to comment on advantages and disadvantages of each type of card, but must clearly explain the differences as specified in the content.

The delivery of learning outcome 7 should ensure that learners practise the planning and construction of business travel itineraries. Tutors should provide actual or simulated examples of customer requests and associated itineraries. These resources could provide the basis for learners to explore each of the transport, accommodation and transfer arrangements in detail, and specifically how they have been presented in the itinerary. Once learners have become

familiar with the components required to construct an itinerary, they could work in groups to practise the planning and construction of further itineraries for given client scenarios. Tutors should emphasise the importance of providing alternative options for travellers, given that due to the nature of business travel, arrangements may need to be altered depending on the needs of the corporation and individual travellers.

The final topic for delivery should focus learners on the booking process, and specifically adhering to corporate travel policies in order to ensure that the requests made by individual travellers or travel arrangers (eg PAs) are within the limits set by the client corporation. A useful exercise could be to provide a simulated travel policy with associated itinerary and task learners to identify whether the policy has been adhered to. At this point in the unit, tutors should ensure they explain the importance of presenting itineraries to professional standards, in order to ensure that learners produce well-presented itineraries during assessment.

Assessment

For the assessment of this unit, tutors should provide scenarios that place learners as junior employees of a travel management company. At this level learners are not expected to fully appreciate the role of an account manager as this role requires significant experience in sourcing travel arrangements.

1.1—1.5 could be assessed through learners producing a guide to the business travel sector as a starting point for their training as newly appointed business travel consultants. 1.1 requires learners to either source or provide their own definition of the term 'business travel' and then explain the definition.

To achieve 1.2, learners must explain at least six key reasons for people travelling on business. It is recommended that learners provide relevant examples to demonstrate their understanding.

To achieve 1.3, learners must explain at least five key differences between the business and leisure travel sectors and should be able to give reasons for the differences within their explanation.

To achieve 1.4, learners must explain the role of travel management companies. At this stage explanations should be clear but do not need to be detailed. A suitable response could be 'Travel management companies are consulted by their clients as they are industry experts and can provide advice on travel arrangements and services that fully meet the needs of the business and individual travellers.' All of the range should be addressed within the explanation.

To achieve 1.5, learners must identify the different types of travel management companies as listed in the unit content and provide a named example for each.

For 2.1—2.6 learners could produce a training manual for a trainee business travel consultant that explains how information technology is used. Learners could be supported by tutors with a template for the manual that simulates a realistic training resource.

To achieve 2.1, learners must correctly identify the three different types of information technology system used to retrieve all of the information listed in the range. Learners could enhance their work with screen shots of any relevant supplier websites.

To achieve 2.2, learners must briefly explain the main uses of information technology. This could be linked to the needs of both the client and the travel management company.

To achieve 2.3, learners must identify all of the GDS available.

To achieve 2.4, learners must briefly explain the main functions of a typical GDS. The explanations should be linked to examples of business traveller needs where relevant.

To achieve 2.5, learners must briefly explain all of the forms of technological communication. Learners' evidence can be supported with examples of business travel communication to demonstrate an understanding of how the technology is used.

Achievement of 2.6 requires learners to explain the need for security and safety of client information and not merely explain how it is stored securely on a computer.

3.1—3.5 could be assessed through a range of practical tasks including a presentation in order to meet each of the assessment criteria.

To achieve 3.1, learners must locate at least three each of UK, European and worldwide business destinations. Learners should be provided with blank maps and must locate the destinations independently using suitable resources.

To achieve 3.2, learners should explain the importance of travel information to business travellers. Learners may support their evidence with examples.

To achieve 3.3, learners must identify major business transport routes, including gateways in and from the UK; this could be shown on blank maps or learners could correctly label maps that already display the relevant routes. At least four routes should be outlined that include all items listed in the unit content, with at least two gateways within each route.

To achieve 3.4, learners must identify the time differences between the UK and four each of European and worldwide countries, including those ahead of and those behind GMT.

To achieve 3.5, learners must explain the effect of time changes on business travellers. Learners can link their evidence to 3.4 and should include the application of daylight saving time and how time is gained or lost when crossing the International Date Line.

4.1—4.6 may be assessed in the workplace or through a series of activities.

To achieve 4.1, learners must provide a brief explanation of the differences between scheduled and charter flights. Learners could present their evidence in table format, listing the range ie frequency, flexibility, price, standards of service, class, typical destinations.

To achieve 4.2, learners must provide a brief explanation of the following standards of service: no frills; full service; first class; premium class; business class, economy. Evidence could be presented in table format.

To achieve 4.3, learners must describe the ways in which published air fares can be offered at discounted prices covering the items listed in the unit content.

To achieve 4.4, learners must identify the air fare and the associated rules and regulations for at least two discounted air fares to a named business travel destination.

To achieve 4.5, learners must select one of the fares and explain fully the rules covering all items listed in the unit content. Learners should select a PEX fare or seasonal excursion fare to ensure that they can cover the full range of items. Tutors should provide learners with relevant extracts from the Air Tariff.

To achieve 4.6, learners must explain the relevant advantages and disadvantages of a selected fare for business travellers. Learners could present their evidence in a table with headings to cover all items listed in the unit content.

For 5.1—5.9 learners could produce a range of training resources for each of the services.

To achieve 5.1, learners could produce a glossary of terminology associated with self-drive vehicle rental that covers the full range as listed in the unit content.

To achieve 5.2, learners must explain the use of vehicle rental vouchers in terms of redemption by business travellers.

To achieve 5.3, learners could produce a glossary of terminology associated with accommodation.

To achieve 5.4, learners must identify the relevant information given to the business traveller for each of the accommodation types.

To achieve 5.5, learners must explain each the different methods of guaranteeing accommodation reservations.

To achieve 5.6, learners must identify the information that should be provided to the business traveller when booking UK rail travel.

To achieve 5.7, learners must identify a minimum of one each of the suppliers of the three different vehicle-carrying services (train, catamaran, ferry). Evidence should cover routes from, to and within the UK.

To achieve 5.8, learners must describe the on-board facilities for a ferry, catamaran and Eurotunnel. Evidence can be linked to 5.7.

To achieve 5.9, learners could produce a leaflet to be given to business travellers that lists the documentation and equipment required for journeys by UK registered vehicles outside the UK. The leaflet must cover all items listed in the unit content.

For 6.1—6.7 learners could produce a guide to ancillary support services that would support them in their role as a junior business travel consultant.

To achieve 6.1, learners must briefly explain each of the circumstances when UK citizens may hold more than one passport as listed in the unit content.

To achieve 6.2, learners must briefly explain the visa requirements for UK citizens travelling outside the UK and should provide examples of itineraries requiring visas to cover the range and to support their explanation.

To achieve 6.3, learners must briefly explain the health requirements for UK citizens travelling from the UK in terms of compulsory and recommended health precautions. This should be linked to relevant itineraries where there are health requirements. Evidence can be linked to the itineraries in 6.2.

To achieve 6.4, learners must provide a brief explanation of the arrangements for health care within the EU and the European Health Insurance Card.

To achieve 6.5, learners must identify five different sources for obtaining foreign currency and travellers cheques and include a named example.

To achieve 6.6, learners must briefly describe five different methods of paying for foreign currency and travellers cheques.

To achieve 6.7, learners must briefly explain the differences between credit, debit and charge cards and this should be in relation to travel expenses rather than in general. Evidence could be in table format covering the range as listed in the unit content, ie application, limitations, billing, fees, terms, protection, reward schemes, acceptance.

7.1—7.6 consolidates the knowledge and understanding gained within the unit and should be assessed through simulated client requests, as learners must demonstrate their ability to plan and construct itineraries and this would best be done through the use of scenarios. Learners can achieve 7.1, 7.2, 7.3, 7.5 and 7.6 by responding to a client request to book a business travel journey from the UK to within Europe.

Tutors will need to ensure that the journey requested includes opportunities for a number of travel options/routes and learners will need to provide alternatives for the same itinerary so that travel options/routes by air, rail, road and sea are covered (7.1). The itinerary will need to include accommodation and self-drive car hire (7.2). The itineraries produced (7.3) should include all the listed travel components (7.5) and the different transfer options available (7.6).

To achieve 7.4, learners must identify each of the items that are listed in a corporate travel policy; tutors could supply a simulated policy document and learners could identify the relevant information.

Essential resources

Learners will require access to PCs and the internet, and also to simulated documents, including customer requests, itinerary templates, and a corporate travel policy.

Indicative resource materials

Textbooks

Davidson R, Cope B – *Business Travel: Conferences, Incentive Travel, Exhibitions, Corporate Hospitality and Corporate Travel* (Prentice Hall, 2002)
ISBN 9780582404441

Swarbrooke J, Horner S – *Business Travel and Tourism* (Butterworth-Heinemann, 2001) ISBN 9780750643924

Websites

www.ba.com	British Airways
www.carlsonwagonlit.com	Carlson Wagonlit Travel
www.EHIC.org.uk	European Health Insurance Card
www.gtmc.org	Guild of Travel Management Companies
www.newfrontiers.co.uk/travel	New Frontiers Travel Recruitment
www.opodo.co.uk	Opodo

Unit 5: Travel Planning

Unit reference number: J/601/3183

Level: 2

Credit value: 6

Guided learning hours: 40

Unit aim

The aim of this unit is for learners to gain the skills and knowledge needed to plan travel arrangements. A range of sources of information will be used to identify individual services which can be combined to make an itinerary tailored to meet customer's requirements. The learners will also be able to identify additional guidance and advice about a journey and destination to enhance the traveller experience.

Unit introduction

Attention to detail is crucial when planning travel, whether it is checking train times or working out which travel vaccinations are required for a trip to Asia. When working in the travel and tourism industry it is essential to know where to find information and to be able to read timetables and brochures, both paper-based and online, in order to plan trips and produce travel itineraries to meet the needs of different types of customers.

Travel agents need to be adept at planning trips and holidays to meet a wide range of customer requirements. The travel planning process starts with establishing customer needs through listening and questioning, offering advice and alternatives to ensure that the final outcome meets all of the customer's requirements. Many factors must be taken into consideration, such as budget, timings, interests and specific needs such as access for reduced mobility. The second stage is to use a range of resources to select the most appropriate elements of the itinerary such as transport, accommodation, transfers, car hire, and then to check availability and where necessary offer advice and guidance about alternatives.

Once the plans are in place and the itinerary established, learners will need to know where to find additional information about the journey and the destination in order to enhance the traveller experience. For example, if the itinerary is for a business trip, this could include the opening times for businesses, public holidays, the business facilities available at the airport and at the accommodation, cultural and language information plus activities and entertainment available to match the customer's interests in their leisure time, such as sporting activities, theatre and music.

Travel planning is all about meeting customer needs and requirements and providing full and detailed information to ensure a successful trip and enhance the traveller experience.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the travel planning process	1.1	Describe the travel planning process
	1.2	Explain factors which affect travel planning
	1.3	Explain benefits of advance travel planning
2 Be able to use sources of travel planning information	2.1	Locate travel and tourism information using reference sources
	2.2	Interpret abbreviation codes used in travel planning
	2.3	Identify potential sources of travel planning information
	2.4	Explain the importance of abbreviation codes
3 Be able to produce travel plans that meet customer requirements	3.1	Identify customer requirements using effective questioning
	3.2	Research options that meet customer requirements
	3.3	Create travel itineraries that meet customer requirements
	3.4	Identify components of travel and tourism itineraries
	3.5	Explain the importance of offering alternative travel and tourism arrangements
	3.6	Explain the importance of comparing alternatives prior to presenting travel itineraries to customers
	3.7	Identify additional factors to consider when recommending travel itineraries

Learning outcomes	Assessment criteria
4 Be able to provide additional information on travel and tourism arrangements	4.1 Provide additional travel and tourism information to customers
	4.2 Identify additional information relating to transport arrangements required by customers
	4.3 Identify destination information which may be of benefit to customers
	4.4 Describe how to present information on travel and tourism arrangements to customers

Unit content

1 **Understand the travel planning process**

Travel planning process: business and leisure customers; establishing customer needs; checking availability; calculating costs; making bookings eg details, reference numbers; taking payment (deposits, full payment) eg cash, cheque, credit/debit cards; providing travel documentation eg tickets, accommodation vouchers, car hire vouchers; producing written itineraries; providing additional information for the destination eg visas, passports, check-in times, car parking

Factors: packages and/or tailor made; timing eg season, visa application, vaccination requirements; duration eg length of stay; budget; availability; suitability; weather; others eg preferred options

Benefits: reduced prices for advanced booking eg APEX fares, low cost airline fares, discounted rail fares; availability to meet requirements eg low fares, choice of rooms/cabins, single rooms/cabins, transfers; time for visa/passport applications and health requirements eg vaccinations

2 **Be able to use sources of travel planning information**

Travel and tourism information: type eg for destination, for transport and transfers, for accommodation, for location of elements; format (paper-based and online)

Reference sources: brochures (packages); timetables/schedules; online agencies eg accommodation, low cost airlines; Computer Reservation Systems (CRS); Global Distribution Systems (GDS); maps and atlases; local and regional tourist information eg online, brochures, from tourist information centres

Abbreviation codes: transport eg APEX, PEX, airport codes, TOD, flight codes, PAX; accommodation eg BB, HB, FB, AI, RO, SV, PB, SH/WC; SC; importance eg used worldwide, aids communication across languages, immediate understanding of service/facility, reduced space on tickets/vouchers etc

3 **Be able to produce travel plans that meet customer requirements**

Creating itineraries: meeting customer requirements eg where, when, duration, costs, type of transport, type of accommodation, type of transfer, activities

Components within itineraries: transport (departure and arrival times, check-in details, flight numbers, operator, booking reference); accommodation (check-in and check-out details, address and telephone, booking reference, room and board booked); transfers and car hire (pick up and drop off details, operator, telephone numbers, booking reference, transfer duration), venues (location, address, telephone); other booked elements eg sporting events, entertainment, activities

Offering alternatives: when first choice is unavailable eg rooms, cabins, flights, departure airports, destination airports; finding nearest alternative eg different hotel/ship, different type of room/cabin, different flight, nearest departure airport, nearest destination airport; importance of offering alternatives eg to secure the booking, to complete the itinerary; comparing costs, standards, suitability and facilities to best meet customer requirements

Additional factors to consider: timings between elements eg travel to airport and flight, flight arrival and transfer to resort; time of year eg high season, low season; weather; age of customer and mobility eg changing platforms, distance from car park to airport terminal, access in and around accommodation; costs eg meeting budget, making savings, finding low fares

4 **Be able to provide additional information on travel and tourism arrangements**

Transport information: essential information (passport, visas, health); travel information eg check-in times, type of aircraft, time zones and elapsed flying times, class of travel and facilities available, pre-bookable seats, online check-in, priority check-in, wheelchair assistance options, airport/station/port car parking and overnight hotels, stopover information

Destination information: eg maps, location of attractions/activities, public holidays and festivals, opening times for shops and businesses, dress codes, culture, language, currency, weather

Providing and presenting additional information to customers: written formats (professional, word processed) eg portfolio of information, within the itinerary

Essential guidance for tutors

Delivery

This unit enables learners to understand the processes involved in planning a trip and the differences between business and leisure customers. Learners should understand and use a wide range of available resources to help with planning a successful trip and producing a detailed itinerary. It is important for learners to appreciate the importance of establishing customer needs and requirements and this is the first part of the planning process.

Learners should be involved in numerous real or role-play situations in which they have to identify exactly what a customer needs in order to meet their requirements. This could be face to face in the travel agency or talking to a customer over the telephone or communicating via email. In all cases skills should be developed to help to establish customer needs by listening, questioning, prompting and advising. Learners should be provided with scenarios for a variety of customers, including business and leisure.

Once learners have established needs and requirements they should use resources in order to identify suitable elements of the trip, such as the transport available from the chosen airport, the accommodation and type of room required at the chosen destination, and the transfers available. For this type of trip, a package could be offered or elements put together for a tailor-made holiday. There are a wide variety of resources available and learners should be provided with opportunities to use both paper-based and online resources. Paper-based resources include brochures and timetables/schedules, for example coach, rail, air, package holidays and tours; travel directories such as gazetteers and guides; and other reference materials such as atlases and maps. Online resources include CRS and GDS; web-based agencies for accommodation, car hire and transfers; airline booking systems; destination information; and dynamic packaging websites.

Learners should be provided with opportunities, real or simulated, to select elements of the planned trip/holiday using a range of resources and then check availability using the telephone, email and/or using the internet. Once availability has been checked, learners should use resources to offer alternatives where necessary. Offering alternatives is a skill to be developed to ensure that the customer remains satisfied that the plans meet their needs. Learners should compare elements such as alternative airports, accommodation, transfer options and car hire options in order to offer the customer the best possible itinerary that is available and also meets their needs. For example, it may be that the customer's preferred options for flights from a particular departure airport are unavailable and learners would need to offer the nearest airport with flights available, identifying that the flights are in fact cheaper and at better times. They may be able to offer two different airports and make comparisons. For example, a customer may want to fly to Geneva in October from Leeds Bradford, but flights are not operating at this time. Flights are operating from Manchester and from Liverpool with a different airline and the learner would need to demonstrate skill in comparing these flights and airports (times, distances, prices) in order for the customer to make an informed choice.

Learners should be provided with opportunities to use real or simulated resources to offer additional information to their customers in order to enhance the travel experience. For example, business travellers often have some leisure time at the destination, and questioning can establish their interests so that information on availability and location of sporting activities, entertainment and tourist attractions can be provided to support a successful trip.

Itineraries may be produced in a variety of formats and these should be professional and word-processed and include full details of all elements of the trip/holiday. Further information such as hotel leaflets, maps, train and bus timetables and tourist information guides may also provided in a portfolio.

Assessment

Assessment for this unit for learning outcomes 2, 3 and 4 may take place in a real or simulated work situation. In simulated situations learners should be provided with scenarios to cover the assessment requirements, and in real work situations learners should be provided with sufficient opportunities to cover the full range of situations with customers. Assessment of learning outcome 1 may be a written piece of work or an oral presentation where learners demonstrate their understanding of the travel planning process.

To achieve 1.1, learners must describe the travel planning process, covering all items of range within the content in written or oral format.

To achieve 1.2, learners must explain the factors that affect travel planning, covering all items of range. Learners should provide examples to illustrate their explanations.

To achieve 1.3, learners must explain the benefits of advance travel planning, providing at least two examples for each item of range.

To achieve 2.1, learners must locate and use both paper-based and online reference sources for at least four different types of information. This should be a practical demonstration of the learner's ability to source travel planning information. This assessment can be linked with 3.1 and 4.1.

To achieve 2.2, learners must interpret abbreviation codes used in travel planning, covering the range in the content. This can be a written or oral test. To achieve 2.4, learners must explain the importance of using abbreviation codes using examples to support their evidence.

To achieve 2.3, learners must identify potential sources of travel information, covering all the range in the content. Some of the range will have been covered in 2.1. Please note it is not essential that all the range should be covered in the practical demonstration for 2.1.

To achieve 3.1—3.3, learners should be in a real or simulated situation with at least two different types of customers (one business and one leisure customer). Learners must identify the customer requirements using effective questioning to achieve 3.1, research options to meet customer requirements to achieve 3.2, and create travel itineraries to meet customer requirements to achieve 3.3.

To achieve 3.4, learners must identify the components that should be included in an itinerary, covering all items in the range. Assessment can be linked to 3.1 and 4.1.

To achieve 3.5, learners must explain the importance of offering alternative travel and tourism arrangements. Learners should provide examples to support their explanations. Assessment can be linked to 3.1, 3.2 and 3.3.

To achieve 3.6, learners must explain the importance of comparing alternatives prior to presenting travel itineraries to customers. Learners could provide examples to support their explanations. Assessment can be linked to 3.1, 3.2 and 3.3.

To achieve 3.7, learners must identify additional factors to consider when recommending itineraries covering the range within the content. Assessment can be linked to 3.1, 3.2 and 3.3.

To achieve 4.1, learners must provide essential information to customers, plus five different types of transport information and three different types of destination information. This practical assessment can be linked to 2.1 and 3.1.

To achieve 4.2, learners must identify additional information relating to transport arrangements required by customers. Assessment can be integrated with 4.1.

To achieve 4.3, learners must identify destination information that may be of benefit to customers. Assessment can be integrated with 4.1.

To achieve 4.4, learners must describe the different ways additional information can be presented to customers using paper-based and online formats.

Essential resources

For this unit learners need access to the internet and to published material including the travel trade press, national newspapers, travel and tourism textbooks and a wide range of holiday brochures.

Indicative resource materials

Textbooks

Dale G – *BTEC Level 3 National Travel and Tourism Student Book 1* (Pearson, 2010) ISBN 9781846907272

Dale G – *BTEC Level 3 National Travel and Tourism Student Book 2* (Pearson, 2010) ISBN 9781846907289

Dale G, Kelly M, King C and Jefferies M – *BTEC Level 3 National Travel and Tourism Teaching Resource Pack* (Pearson, 2010) ISBN 9781846907296

Holloway C – *The Business of Tourism* (FT Prentice Hall, 2006) ISBN 9780273701613

James E, Thirlaway J and Woodhouse U – *BTEC National in Travel and Tourism* (Hodder Education, 2007) ISBN 9780340945735

Maurer E – *Internet for the Retail Travel Industry* (Delmar Learning, 2002) ISBN 9780766840713

Sharpley R – *The Tourism Business: an Introduction* (Business Education Publishers, 2002) ISBN 9781901888232

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

www.abta.com	The Travel Association
www.advantage4travel.com	Advantage Travel Consortia
www.caa.co.uk	Civil Aviation Authority
www.expedia.co.uk	Expedia
www.fco.gov.uk	British Foreign and Commonwealth Office Travel Information
www.gazetteers.com	Gazetteers — travel information (please note this website requires a licence)
www.thomascook.com	Thomas Cook Tour Operator
www.travel2.com	Travel 2
www.tuitravelplc.com	TUI Travel Tour Operator
www.worldtravelguide.net	*Columbus World Travel Guide*

Unit 6: UK Travel and Tourism Destinations

Unit reference number: H/601/5443

Level: 2

Credit value: 7

Guided learning hours: 52

Unit aim

The aim of this unit is to enable learners to improve their knowledge of UK tourism destinations, to understand the attractions of key features for different groups, and to understand the different accommodation and catering facilities available at the destination.

Unit introduction

Employees who have a good knowledge of UK tourism destinations are highly regarded by employers in the travel and tourism sector. Travel agents, tour operators and tourist boards play their part in promoting UK travel and tourism destinations, while visitor attractions, hospitality and transport providers develop the services and facilities that contribute to their appeal. Knowledgeable staff make a considerable contribution to the overall success of these organisations.

Having a sound awareness of what the UK has to offer tourists is an excellent starting point for anyone planning to work in the travel and tourism sector. In this unit learners will examine what makes the countries of the UK different in their appeal – their physical features, their transport links, and the wide variety of destinations and attractions they offer the tourist. Learners will locate major tourist cities, towns, seaside and purpose built resorts in England, Northern Ireland, Scotland and Wales, and identify the attractions that help to draw tourists to different regions.

There are many features that contribute to the popularity of a destination and learners will use different sources of information to investigate how specific destinations attract different types of visitors.

On completion of this unit, learners will have developed their ability to use resources to locate important tourist destinations with increased confidence, and will have broadened their product knowledge of what the UK offers its visitors.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Know UK physical features relating to travel and tourism	1.1	Identify the geographical structure of the United Kingdom
	1.2	Locate seas, oceans and waterways of the United Kingdom
	1.3	Locate major islands around the United Kingdom
	1.4	Locate major rivers and lakes of the United Kingdom
	1.5	Locate major ranges of mountains and hills of the United Kingdom
	1.6	Locate national parks in the United Kingdom
2 Know established tourism destinations within the United Kingdom	2.1	Locate gateways within the United Kingdom
	2.2	Locate main air, rail and road routes used within the United Kingdom
	2.3	Understand the importance of links between gateways and main air, rail and road routes
	2.4	Locate tourist cities and towns
	2.5	Locate purpose-built and seaside resorts
	2.6	Locate national sporting venues
	2.7	Locate national conference venues
	2.8	Locate heritage and cultural sites
	2.9	Locate attractions
3 Understand what attracts tourists to the United Kingdom	3.1	Identify different types of tourists and groups of tourists, which travel to UK tourism destinations
	3.2	Identify the specific appeal of tourism destinations
	3.3	Identify sources of information about tourism destinations

Learning outcomes	Assessment criteria
	3.4 Describe the facilities and services, which may be required, by different types of tourists
	3.5 Describe types of accommodation and classifications available at tourism destinations
	3.6 Describe types of catering facilities available at tourism destinations

Unit content

1 **Know UK physical features relating to travel and tourism**

Structure: four countries of the United Kingdom; capital cities

Seas/oceans/waterways: eg North Sea, Irish Sea, English Channel, Atlantic Ocean, Bristol Channel, Solway Firth, the Solent, the Wash, St George's Channel, Straits of Dover, Cardigan Bay, Firth of Forth, Firth of Clyde, Firth of Lorn, the Caledonian Canal

Major islands and island groups around the UK: islands eg Isle of Man, Anglesey, Isle of Wight, Arran, Holy Island; island groups eg Shetland Islands, Orkney Islands, Outer Hebrides, Inner Hebrides, Channel Isles, Isles of Scilly

Major UK rivers and lakes: rivers eg Tyne, Tees, Ouse, Thames, Avon, Severn, Mersey, Trent, Clyde, Dee, Tweed, Bann, Foyle; lakes eg Lough Neagh, Loch Lomond, Loch Ness, Windermere, Ullswater, Bala Lake; other eg Rutland Water, Kielder Water

Major UK ranges of mountains and hills: mountain ranges eg Grampians, Pennines, Mourne Mountains, Cairngorms, Black Mountains, Brecon Beacons, Cambrian Mountains, Chiltern Hills, Cotswold Hills, Cheviot Hills; mountains eg Ben Nevis, Snowdon, Scafell Pike, Slieve Donard

UK National Parks: eg Cairngorms, Loch Lomond and the Trossachs, Northumberland, Yorkshire Dales, North York Moors, Lake District, Peak District, Snowdonia, Brecon Beacons, Pembrokeshire Coast, the Broads, the New Forest, South Downs, Dartmoor, Exmoor

2 **Know established tourism destinations within the United Kingdom**

Gateways: by air eg London City, London Heathrow, London Gatwick, Stansted, Luton, Birmingham, Manchester, Newcastle, Glasgow, Aberdeen, Edinburgh, Cardiff, Belfast; by sea eg Dover, Harwich, Hull, Newcastle, Aberdeen, Stranraer, Liverpool, Holyhead, Portsmouth, Southampton, Plymouth, Poole, Belfast; Channel Tunnel eg Ashford International, Folkestone

Main air, rail and road routes: eg motorways, air routes, mainline rail routes

Tourist cities: eg Bangor, Bath, Belfast, Cambridge, Canterbury, Cardiff, Derry~Londonderry, Durham, Edinburgh, Glasgow, Inverness, Leeds, Liverpool, London, Newcastle upon Tyne, Oxford, York

Tourist towns: eg Betws-y-Coed, Buxton, Carlisle, Cheltenham, Fort William, Glastonbury, Harrogate, Keswick, Llangollen, Newry, Omagh, Pitlochry, Royal Tunbridge Wells, Stratford-upon-Avon, Truro, Warwick, Windsor

Purpose-built resorts: eg Sherwood Forest Center Parc, Haven Seton Sands, Pontins Prestatyn Sands, Butlins Bognor Regis, Portmeirion, Alton Towers resort

Seaside resorts: eg Ayr, Blackpool, Bournemouth, Eastbourne, Great Yarmouth, Ilfracombe, Margate, Newquay, Oban, Portrush, Portstewart, Rhyl, Scarborough, Skegness, Southwold, St Andrews, St Ives, Tenby, Torquay, Weston-super-Mare

National sporting venues: eg Cardiff Millennium Stadium, Wembley Complex, Hampden Park, Murrayfield, Twickenham, Lord's Cricket Ground, The Oval, Ascot, Epsom, Aintree, Downpatrick, The Belfry, St Andrews, Crystal Palace national sports centre, Wimbledon, Manchester Velodrome

National conference venues: eg The O2, Manchester MEN Arena, Earls Court and Olympia, Birmingham NEC, ExCel, SECC Glasgow, EICC Edinburgh, Cardiff Millennium Stadium, Belfast Odyssey Arena

Heritage and cultural sites: eg Edinburgh Old and New Towns, Culloden, Hadrian's Wall, Durham Castle and Cathedral, York, Saltaire, Ironbridge Gorge, Bath, Stonehenge, Windsor Castle, Tower of London, Palace of Westminster, Greenwich, Caernarfon Castle, Conwy Castle, Giant's Causeway

Attractions: theme parks eg Alton Towers, Legoland, Blackpool Pleasure Beach, Thorpe Park, Loudon Castle Theme Park, Oakwood Theme Park*;* man-made eg London Eye, Madame Tussauds, Eden Project, Royal Armouries, Life Science Centre, Jorvik Viking Centre, Beatles Story, St Fagans, Ulster Folk and Transport Museum, Gretna Green Old Blacksmith's Shop, Our Dynamic Earth; natural eg Giants Causeway, Kielder Forest, Lake District, Norfolk Broads, Cheddar Gorge; attractions available in the local area eg leisure facilities, theatres, walks, boat trips, tours, shopping complexes, parks

3 **Understand what attracts tourists to the United Kingdom**

Types of tourists: domestic; overseas; purpose of visit eg leisure, business, visiting friends and relatives (VFR), special interest; specific needs eg age, ability; party size eg independent, family, group

Appeal: eg cultural, historic, natural features, sightseeing, business, sport and recreation, man-made features, visiting friends and family

Sources: eg internet, maps, atlases, tourist guide books, leaflets, brochures, trade directories, trade press, Tourist Information Centres, colleagues, TV

Facilities and services: eg entertainment, attractions, sport and leisure, transport, specific facilities (ie people with specific needs)

Types of accommodation: catered and self-catering eg hotel, motel, inn, farmhouse, bed and breakfast, boat, caravan, tent, cottage, apartment

Classifications: eg cottages and apartments, caravan and camping sites, hotels, bed and breakfast, RAC, AA, Michelin, VisitBritain

Catering facilities: eg fast food, restaurants, coffee/tea shops, cafes, hotels, pubs

Essential guidance for tutors

Delivery

The accessibility of overseas travel today means that learners' experiences of holidays in the UK may be limited, and knowledge of UK tourist destinations is valued by employers. Successful delivery of this unit will help to bridge this knowledge gap and develop learners' interest in UK tourist destinations.

The unit covers the whole of the UK — England, Northern Ireland, Scotland and Wales — and the content is potentially huge, therefore the unit can be seen only as an introduction to UK travel and tourism destinations.

A good starting point may be to find out what learners already know and where they have travelled in the UK, on day trips, holidays or to visit friends and family. This can be achieved through different methods, for example discussions, photo quizzes, picture dominoes etc.

Learners should be introduced to different resources at an early stage of delivery and should not become over-reliant on the internet as a resource. Tutors should have a wide variety of UK holiday brochures and leaflets available for learners' use. Practical activities should be devised to help them become proficient and independent in using atlases, brochures, leaflets, guide books, trade manuals and websites. Learners should be encouraged from the outset to record the sources they use.

Tutors can adopt different approaches to delivery and the timing of assessment, for example focusing on one country at a time for delivery and assessment, or working through the content and assessment by outcome, covering the four countries simultaneously. Whichever approach is adopted, workbooks or activity sheets could be devised for class activities, and evidence could be collected for assessment on an ongoing basis. Activities could include individual, paired or group research, quizzes and presentations. Tourist board DVDs and TV travel programmes can be used to help learners to identify the differences between tourist destinations in the UK and to understand how they might appeal to different types of visitors.

Before examining what attracts visitors to destinations it would be useful to consider what different types of visitors are looking for when they travel to UK destinations. Mind mapping would be a useful way to record ideas and to work through different aspects of appeal for different types of visitors. Learners must consider the needs of different types of visitors, including domestic and overseas tourists, different ages, party size, special interests and special needs.

Transport by rail, coach, air and road is to be examined and key air and seaport gateways must be identified. It would be useful for learners to be introduced to the concept of using three letter codes to distinguish airports as this is expected practice in the workplace.

Appeal can be easier to appreciate if viewed through the eyes of the tourist. As a formative activity, learners could visit a local tourist destination. Simple worksheets could be compiled covering the different elements of the unit content. This would enable learners to make tangible, first-hand observations about what attracts different types of visitors to a known destination. Tutor-led reinforcement of different aspects of appeal will be necessary to ensure that all learners have a good understanding of what will be required for the assessment activities.

Assessment

Much of the assessment for this unit requires learners to locate different aspects of UK travel and tourism destinations. This could be approached in a number of ways. For example, a workbook could be designed containing templates and blank maps for learners to complete in conjunction with class activities and research. A more practical approach could be taken to generate some of the evidence, for example by observing learners carrying out role plays with 'customers' in a travel agency or tourist information office. If this latter approach is adopted, observation sheets should be completed to confirm how the specific criteria have been achieved, supported by photographic evidence, witness statements etc.

The evidence must ensure that examples span all four countries of the UK and learners should aim to include a broad coverage of these countries, rather than focusing on a limited area. It is acceptable for learners to use atlases and other sources to help them to identify locations accurately. In all cases the numbers given are the minimum required for assessment purposes.

The focus for learning outcome 1 assessment is on physical features of the UK.

For 1.1 learners must accurately identify the four countries of the UK and their capital cities. These should be shown on a map.

For 1.2 learners must locate six seas, oceans or waterways of the UK (including at least one of each).

For 1.3 learners must locate six major islands or island groups around the UK.

For 1.4 learners must locate one major river and one major lake in each country of the UK.

For 1.5 learners must locate one major range of mountains or hills and one named mountain in each country of the UK.

For 1.6 learners must locate two National Parks in England, in Scotland and in Wales.

The focus for learning outcome 2 is on transport and established tourism destinations in the UK.

For 2.1 learners must locate two gateways by air and two passenger seaports in England, in Wales, in Scotland and in Northern Ireland, and one UK gateway for the Channel Tunnel.

For 2.2 learners must locate main air, rail and road routes used within the UK. This can be developed from 2.1. For example, they could locate one air route and the main road and rail routes from each of the air gateways, and also the main road and rail routes from the seaports selected for 2.1. To achieve 2.3 they must explain briefly why it is important for gateways to have good road and rail routes.

For 2.4 learners must locate two tourist cities and two tourist towns in England, in Northern Ireland, in Wales and in Scotland.

For 2.5 learners must locate three purpose-built resorts and six seaside resorts, with at least one example in each country.

For 2.6 learners must locate six national sporting venues, including at least one in each country.

For 2.7 learners must locate six national conference venues, including at least one in each country.

For 2.8 learners must locate six heritage/cultural sites, including at least one in each country.

For 2.9 learners must locate six theme parks, six man-made attractions and six natural attractions, including at least one of each in each country.

The focus for learning outcome 3 is on what attracts tourists to specific UK destinations. Learners should select one major tourist destination in each UK country (four in total). For greater interest this should include a variety of destinations, for example a city, a tourist town, a seaside resort, a rural or purpose-built destination. Learners could produce a leaflet or poster, or make a presentation for each destination.

For 3.1 learners must identify different types of tourists and groups of tourists attracted to the selected destinations, for example domestic overseas, leisure, business, visiting friends and relatives (VFR), special interest, different ages, special needs, and different party types, for example groups, families, independent tourists.

For 3.2 learners must identify the specific appeal of the selected four destinations, for example cultural, historic, natural features, sightseeing, business, sport and recreation, man-made features.

For 3.4 learners must describe the facilities and services provided for different types of tourists, including entertainment and attractions, transport, specific facilities (ie for people with specific needs).

For 3.5 learners must describe four types of accommodation available at each of the selected destinations, including details of their official classifications.

For 3.6 learners must describe four types of catering facilities available at the four selected tourism destinations.

3.2 can be achieved by the production of a bibliography detailing the varied sources used when completing the activities for learning outcome 3. This should include at least four different types of resources, for example the internet, holiday brochures, guidebooks and an atlas.

Essential resources

Learners must have access to atlases, holiday brochures, guide books and the internet. They should be encouraged to use their experiences of their own locality, as well as destinations they may have visited or gateways they have used.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006)
ISBN 9781902221939

Ingle S, King C, Kerr A, Jefferies M, Rock T and Spencer C (editor Woodhead V) – *BTEC Level 2 First Travel and Tourism Student Book* (Pearson, 2010)
ISBN 9781846907494

Websites

There are many websites providing detailed information about the UK and its attractions. Some examples include:

earth.google.com	Google Earth
www.aberdeen-grampian.com	Aberdeen tourism
www.angusanddundee.co.uk	Argus and Dundee tourism
www.ayrshire-arran.com	Ayrshire and Arran tourism
www.discovernorthernireland.com	Northern Ireland Tourism
www.eastmidlandstourism.co.uk	East Midlands tourism
www.edinburgh.org	Edinburgh tourism
www.english-heritage.org.uk	English Heritage
www.enjoyengland.com	Enjoy England
www.glasgow.gov.uk	Glasgow tourism
www.gotobelfast.com	Belfast tourism
www.nationaltrust.org.uk	The National Trust
www.nitb.com	Northern Ireland Tourist Board
www.nts.org.uk	The National Trust for Scotland
www.nwt.co.uk	North Wales tourism
www.perthshire.co.uk	Perthshire tourism
www.shetlandtourism.com	Shetlands tourism
www.visitbritain.co.uk	Visit Britain
www.visitdumfriesandgalloway.co.uk	Dumfries and Galloway tourism
www.visiteastofengland.com	East of England tourism
www.visitenglandsnorthwest.com	England's North West tourism
www.visitfife.com	Kingdom of Fife tourism
www.visithebrides.com	Outer Hebrides tourism
www.visithighlands.com	Highlands tourism
www.visitlondon.com	London tourism
www.visitmidwales.co.uk	Mid Wales tourism
www.visitnortheastengland.com	North East England Tourism
www.visitorkney.com	Orkneys tourism
www.visitpembrokeshire.com	Pembrokeshire tourism
www.visitscotland.com	Scotland Tourist Board
www.visitscottishborders.com	Scottish borders tourism
www.visitscottishheartlands.com	Argyll, the Isles, Loch Lomond, Stirling and the Trossachs tourism

www.visitsoutheastengland.com	South East England tourism
www.visitsouthwales.com	South Wales tourism
www.visitsouthwest.co.uk	South West tourism
www.visittheheart.co.uk	Heart of England tourism
www.visitwales.co.uk	Wales Tourist Board
www.yorkshire.com	Yorkshire tourism

Unit 7: Air Fares and Ticketing

Unit reference number: R/601/5423

Level: 2

Credit value: 10

Guided learning hours: 80

Unit aim

The aim of this unit is to enable learners to construct a range of fares for given journeys/itineraries.

Unit introduction

This unit enables learners to develop their skills in order to quote fares, interpret and issue air travel documentation, and provide air travel information accurately and speedily to the standard required for those employed within business travel agencies and airline reservations. The unit provides opportunities for learners to develop their knowledge and skills to a level required to meet industry regulations as set by the International Air Transport Association (IATA). These skills are useful for those working in other parts of the travel and tourism sector, such as retail agents and tour operators.

Air transport is one of the most dynamic industries in the world. The International Air Transport Association (IATA) is its global trade organisation. Part of their role is to set standards and guidelines on air fare construction and the issuing of air travel documentation. Many components of the travel and tourism industry are involved in dealing with airlines, providing information, quoting and constructing fares and issuing tickets. Understanding and gaining knowledge of these global standards will provide prospective employees with a skill that is valued by employers.

The first part of the unit will provide learners with the skills needed to provide air travellers with a range of information. Learners will then construct and quote a range of air fares from first class to economy, one way and return for both adult and child passengers in accordance with relevant rules and restrictions. Learners will also develop the skills to complete tickets and to understand ticketing procedures and abbreviations used by IATA within the ticketing process, whether manual, automated or e-ticketing. IATA also issues other documentation in conjunction with air tickets and the final part of the unit allows learners to develop the skills to issue and interpret this documentation when required.

The skills and understanding of IATA procedures developed in this unit provide a basis for progression to the internationally recognised IATA qualification.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Know IATA codes	1.1	Describe IATA codes
	1.2	Encode and decode IATA codes
2 Know IATA areas	2.1	Define IATA areas
	2.2	Define the IATA areas and sub-areas
3 Understand IATA terms and definitions	3.1	Explain IATA terms and definitions
	3.2	Explain what is meant by the term Global Indicators
	3.3	Recognise Global Indicators as EH Eastern Hemisphere; WH Western Hemisphere; AP Atlantic Pacific; TS Trans Siberian; AT Atlantic
	3.4	Define stopovers
	3.5	Define pricing units and fare components
4 Understand fare types	4.1	Identify and interpret rules for fare types
	4.2	Identify restrictions for fare types
	4.3	Identify restrictions for fare types
	4.4	Define fares of more than one type/rule/airline
5 Be able to select the most appropriate fares	5.1	Select the most appropriate fare type for a given itinerary using the appropriate reference material
	5.2	Explain the fare restrictions for the fare selected
	5.3	Determine and calculate passenger type discounts

Learning outcomes	Assessment criteria
6 Be able to construct basic fares using the mileage system	6.1 Construct normal fares for a given itinerary for a one way and return trip based on the following factors: a Mileage system b Neutral Unit of Construction (NUC) c Rate of Exchange (ROE) d Rounding Units 6.2 Show fare constructions in an appropriate format
7 Be able to interpret air travel documentation	7.1 Interpret documents used in air travel 7.2 Explain different documents used in air travel 7.3 Identify terminology used on documents 7.4 Explain information displayed on documents 7.5 Identify different payment methods
8 Know baggage allowances, taxes, fees and charges	8.1 Identify free baggage allowances 8.2 Identify excess baggage allowances 8.3 Identify taxes, fees and charges

Unit content

1 **Know IATA codes**

Codes: IATA three-letter city/airport codes; airline designator codes; country codes; currency codes; aircraft codes; tax codes; flight routings

2 **Know IATA areas**

Geographical areas: traffic conference areas 1, 2 and 3; sub-areas of traffic conference areas 1, 2 and 3

3 **Understand IATA terms and definitions**

Terms and definitions: global indicators (EH, WH, AP, TS and AT); stopovers; time (elapsed flying times, local times); flight schedules; minimum connecting times; pricing units; fare components; tickets (two coupon ticket, four coupon ticket, conjunction ticket, e-ticket)

4 **Understand fare types**

Normal fares: fare classes (F class, J/C class, Y class); fare types (one way, return, mixed class); rules and restrictions eg validity, maximum permitted mileage; fare basis codes eg Y, J, F

Special fares: fare types (APEX, PEX, Excursion); rules and restrictions eg deadlines, minimum and maximum stay; fares basis codes eg YAP, YEE6M

5 **Be able to select the most appropriate fares**

Fares: most appropriate eg normal, special; calculate passenger discount eg child, infant; rules and restrictions

6 **Be able to construct basic fares using the mileage system**

Normal fares: one way; return; rules and restrictions

Mileage system: Maximum Permitted Mileage; Ticketed Point Mileages; Extra Mileage Allowances; Extra Mileage Surcharges; Neutral Unit of Conversion to local currency

Format: fare construction box; Transitional Automated Ticket entry

7 **Be able to interpret air travel documentation**

Tickets: manual two coupon return; two coupon one way; four coupon; conjunction; linear formats, eg Off Premises Transitional Automated Ticket (OPTAT), Off Premises Automated Ticket and Boarding Pass (OPATB); e-ticket

Multi-purpose documentation: Miscellaneous Charges Order (MCO); Multi-Purpose Document (MPD); Universal Credit Card Charge Form (UCCCF)

Format: forms of payment; terminology; information

8 **Know baggage allowances, taxes, fees and charges**

Baggage allowances: free; excess

Charges: taxes; service charges

Essential guidance for tutors

Delivery

This unit allows learners to develop the practical skills and knowledge needed to meet the international standards in air fares and ticketing at Level 1 set by IATA. It is suggested that, initially, learners' understanding of charter, scheduled and low cost airlines is checked to ensure that they are fully aware that IATA standards apply to scheduled airlines only, and that while low cost airlines do operate to a schedule they are ticketless, therefore many of the skills developed throughout this course would not be required by a low cost airline. Learners' knowledge of worldwide geography should be developed together with the skills needed to use an atlas.

One approach to delivery could be to follow manuals published by a variety of IATA-approved publishers, particularly as the unit is intended to equip learners with the skills needed to pass the IATA Level 1 examination. Publishers of IATA materials provide the full course materials, allowing learners to work at their own pace and recap on learning outside lesson time. Alternatively, materials could be developed and blank documents used to set activities that replicate typical customer requirements.

It is recommended that coverage of IATA geography takes place at the start of the unit, as learners will need to understand and be able to work in accordance with IATA geographical requirements in order to complete this unit. This should be followed by an introduction to manuals and timetables as learners will need to use these throughout. It is suggested that the Passenger Air Tariff is used and that this is broken down into parts. Discussion of each part should take place, with learners encouraged to label their copy to allow them to access the information easily. Learners should be confident in using a timetable before assessment takes place. Delivery could involve learners using simpler timetables first, or timetables that they may deal with on a regular basis, such as bus or train timetables. Using the Passenger Air Tariff, learners should complete a range of exercises covering the unit content to develop their confidence in using the air tariff. The exercises could involve questions that cover a variety of the unit content at once, or set questions that cover requirements separately. These questions could be a set of written questions or take different formats, including emails, answering phone messages in the workplace or role-play scenarios, allowing learners to develop the skills to access the higher criteria and making the learning more stimulating by reflecting industry practice.

Learners are required to construct and quote a range of air fares to achieve outcomes 4, 5 and 6 in accordance with IATA standards. It is suggested that learners are provided with the opportunity to complete tickets, allowing ticketing skills to be developed while quoting and constructing air fares. Completing tickets will provide learners with the skills needed to meet the requirements of the IATA Air Fares and Ticketing examination. As a starting point, learners should be introduced to normal fares covering the basic classes and the rules and restrictions that apply to these fares. It is suggested that issuing normal fare tickets follows this, allowing learners to familiarise themselves with the different types of ticket and gain confidence in issuing normal tickets for a range of situations. Learners can then see the whole process and the relationship between rules, governing fares and their inclusion on a ticket. Learners will need to identify all the different

boxes on the ticket and understand the requirements of each. Learners should be provided with numerous exercises to allow them to develop skills and become confident in constructing and quoting fares and then issuing the tickets. Learners could do this by answering a series of questions posed either in writing, through role play or in the workplace. Learners should then be introduced to special fares commencing with APEX fares, identifying the rules and restrictions associated with this fare type. Learners should only move on to PEX fares and then excursion fares once they are confident with the principles of the APEX fare. Learners should be provided with numerous examples of each to allow them to develop the skills needed to quote special fares. Learners should be provided with a range of scenarios allowing them to choose appropriate fares based on different travelling and booking requirements. Special fare ticket issuing should follow, with learners identifying areas that need completing differently from normal fares.

Automated tickets are now commonplace and while very similar to manual tickets, information can appear differently. Learners need to be aware that the fare calculation appears in linear format. Learners should spend time identifying the linear format on automated tickets for both normal and special fares. It is suggested that learners are given a number of exercises covering both one-way and return tickets for normal and special fares to check their understanding and ability to complete these in accordance with IATA standards. In addition to this, learners should feel confident in locating and identifying information on an automated ticket. Learners should be provided with automated ticket exercises that have missing information which the learners should complete. Learners may find validity boxes, linear formats and special fare rules difficult to grasp, and should be given ample opportunities to develop their understanding of these concepts.

The mileage system is often difficult for learners to understand, so learning outcome 6 needs to be broken down into parts with careful delivery of each part. Number skills are crucial in developing learners' ability to demonstrate that this learning objective has been achieved. It is suggested that neutral units of construction are covered first, allowing learners to become confident with conversions; tutors should provide learners with numerous exercises to develop their knowledge and skills. The next stage should be discussing the basics of the mileage system and why the mileage system exists. Learners should start with one way journeys that are within mileage, and should be encouraged to check maximum permitted mileages for journeys and then calculate the ticket point mileage that the traveller will be undertaking. Once an understanding of one way journeys has been achieved, learners should move on to return journeys that are within mileage. Learners should be provided with a detailed explanation of the mileage calculation process and given numerous exercises. Movement to journeys that are over mileage should only be made once a good level of understanding has been achieved. Learners need to understand extra mileage allowances as a starting point and should be involved in locating extra mileage allowances for a range of scenarios. Extra mileage surcharges should follow, with detailed explanations provided to learners followed by numerous exercises for learners to undertake. Once learners are confident in dealing with extra mileage allowances and surcharges, they should be provided with detailed scenarios involving checking mileage, quoting a fare and showing fare calculation in an appropriate format. It is suggested that this stage is followed by learners completing tickets. Learners may find the principles of the mileage system difficult to grasp, and should be given ample opportunities to develop their understanding of this concept.

It is essential that delivery of learning outcomes 4, 5 and 6 be undertaken in small blocks of learning, building towards achievement of the learning outcomes. As these learning outcomes require numerical skills, many learners may find the concepts difficult to grasp. Learners are often at different stages of understanding and may require additional activities to develop these skills. It may be useful, initially, to undertake a number skills assessment to determine whether some learners will need additional support to ensure they have the appropriate level of numeracy to cope with the demands of the unit.

In addition to tickets, IATA also issue other documentation, often in conjunction with air tickets, that learners need to be able to interpret to fully achieve learning outcome 7. Multi-purpose documentation needs careful explanation and it is suggested that learners use a range of completed examples to support their explanations. Links between air tickets and multi-purpose documentation should be made, allowing learners to understand why they are issued. Learners should be provided with a range of exercises for different scenarios, allowing them to become confident in interpreting IATA multi-purpose documentation. It is also suggested that learners complete multi-purpose documentation to fully develop their skills and meet IATA standards in the workplace or outside the workplace.

Delivery and assessment should be ongoing throughout this unit, with learners building up a portfolio of evidence for assessment. All learning and assessment should lead towards the achievement of timed tests to reflect the pressures and speed required by the industry. Not all learners will be able to achieve a high level of accuracy during a timed test, and these learners are not ready to sit the IATA Air Fares and Ticketing Level 1 examination.

Assessment

Assessment for this unit will involve learners completing a series of practical and written exercises to produce a portfolio of evidence. Practical and written exercises are available within air fares and ticketing training manuals, and as these are issued for candidates sitting the official IATA Level 1 examination, they will provide a large part of the evidence required for this unit. Additional exercises will be required to ensure full coverage of the unit content. These could take the form of written exercises, verbal questioning or role plays. Some evidence could be generated within the workplace. In order to develop skills and confidence, the use of role plays is recommended to allow learners to develop their abilities to work to industry standards. If role plays are used, observation record sheets must be included within the learner evidence.

Tutors should note that all assessment evidence provided for this unit must be cross-referenced to the assessment criteria. It is not acceptable for learners simply to present IATA certificates or workbooks in place of clearly labelled assessment evidence. As this unit does not include a time-based externally set assessment, it is essential that learners are assessed on all content listed unless it is an 'eg'.

The assessment criteria are grouped together as follows: 1.1—3.5; 4.1—6.2; 7.1—7.5; 8.1—8.3. Centres should design their assessment strategies to meet a range of individual needs and the workplace environment. Assessment should encourage the learner to apply knowledge gained from this unit and reflect on understanding gained from other units.

It is not recommended that this unit is assessed through one piece of work as if in an examination. This would not allow learners to develop over time the principles required to meet IATA standards. It is recommended that the unit is split into

smaller parts, allowing achievement to be ongoing, through a series of exercises covering all the essential content. However, it is recommended that learners should undertake two timed examinations, both covering all the essential content, in order to reflect the pressures and speed required by the industry and as preparation for sitting the IATA Level 1 examination.

Learners should be aware that passing this unit does not constitute being qualified to IATA standard and learners should seek separate certification for this if required.

Assessment criteria 1.1–3.5

For 1.1, learners should provide a general description of the different IATA codes as specified in the unit content. To achieve 1.2, learners must demonstrate their ability to encode and decode the range of different codes; evidence must show the learner's ability to deal with each code more than once. 2.1 and 2.2 require the learner to define each IATA traffic conference area and their relevant sub-areas. In order to achieve 3.1, 3.2, 3.3, 3.4 and 3.5, learners need to explain each of the terms specified in the unit content, for example elapsed flying time is the length of time the aircraft is in the air and is calculated from the departure and arrival times as shown in the flight schedule. As flight schedules show local times then conversion to the same time zone is needed to calculate the elapsed flying time. In addition to this, learners should provide more than one practical example of each of the terms and definitions to demonstrate their abilities and understanding. Evidence may be produced in written format or by oral questioning, with appropriate records justifying achievement, signed and dated by learners and tutors.

Assessment criteria 4.1–6.2

Learning outcomes 4, 5 and 6 require learners to identify, interpret and construct a range of air fares and these outcomes are linked. For 4.1–4.4, learners must provide evidence that they can identify and interpret a range of both normal and special fares and their relevant rules and restrictions as detailed within the unit content. As 4.5–6.2 require learners to select and construct fares, learners could evidence some or all of 4.1–4.4 at the same time and through the same tasks. Evidence must be cross-referenced accordingly. Learners should be provided with a range of exercises to identify and interpret rules and restrictions and fare basis codes for the range of fare types as specified in the unit content.

To achieve 5.1, learners must provide evidence of their ability to combine fares and select the most appropriate fare for a given itinerary. As a minimum three scenarios should be provided to cover the range for 5.1, 5.2 and 5.3. It is suggested that the first scenario should be for a special fare and include the calculation of rebated fares for an adult, a child and an infant passenger. It is suggested that the second scenario requires learners to calculate a normal mixed class fare for a return journey. The third scenario should be for a special fare different from that used for the first scenario. It is recommended that learners' evidence should also include completed tickets to meet IATA standards. Learners could be provided with a worksheet such as those included within IATA training materials, which allow assessment to take place and cover the criteria. To achieve 5.2 learners must include an explanation of the fare restrictions for the fare chosen for 5.1, in written format or presented orally as if providing a customer with information. Appropriate recording documentation should be signed and dated by the tutor/assessor and the learner, justifying the achievement of 5.2.

In order to achieve 6.1 learners should be provided with two scenarios, one for a one way and one for a return journey that allows them to demonstrate their ability to select a fare, check mileage requirements, apply extra mileage allowances, apply extra mileage surcharges, and convert neutral units of construction into local currency. It is recommended that learners also complete appropriate tickets for each scenario, which should be provided as evidence. Additionally for 6.2, learners should complete fare calculation boxes and TAT entry boxes, demonstrating the learner's ability to write in linear format (this could be evidenced without learners having to complete full tickets and could be linked to mileage to show evidence of a range of different TAT entry formats). Learners could be provided with a worksheet such as those included within IATA training materials, which allow assessment of fare construction and the principles of the mileage system to take place and cover the criteria.

Assessment criteria 7.1–7.5

To achieve 7.1, 7.2 and 7.3, learners must interpret and explain a range of air travel documents including MCO, MPD and UCCCF. Learners could be given exercises where they interpret and identify information and terminology on these documents. Learners could evidence achievement by completing multi-purpose documentation, including at least one MCO, one MPD and one UCCCF. Completion of these can be through individual exercises or linked to air tickets that the learners have issued. To achieve 7.4 and 7.5 learners are required to explain each of the documents, stating what they are, the information they contain and why they are used by IATA. Evidence may be in written format or by oral questioning with appropriate records justifying achievement signed and dated by learners and tutors/assessors.

Assessment criteria 8.1–8.3

The learner's evidence for 8.1–8.3 requires them to identify free baggage allowance, excess baggage allowances and taxes, fees and charges. As learners have previously been required to interpret and complete air tickets, it is suggested that the evidence required to achieve this outcome is obtained through these exercises and is referenced accordingly with correct assessment criteria.

Essential resources

IATA training materials are available from a number of IATA material publishers, such as World Air Fares Training and Virgin Atlantic. These include learning materials and exercises to cover the content of the unit. The Passenger Air Tariff Manual, usually available with the training pack and exercises, is essential.

Indicative resource materials

Textbooks

Brickell D, Kerr A, Lindsay V, Spencer C, Sutherland D and Sutherland J – *BTEC Nationals in Travel and Tourism* (Longman, 2008) ISBN 9781405868099

Dale G – *Level 3 BTEC National Travel and Tourism Student Book 1* (Edexcel 2010) ISBN 9781846907272

Dale G – *Level 3 BTEC National Travel and Tourism Student Book 2* (Edexcel 2010) ISBN 9781846907289

Dale G, Kelly M, King C and Jefferies M – *Level 3 BTEC National Travel and Tourism Teaching Resource Pack* (Edexcel 2010) ISBN 9781846907296

Website

www.iata.org   International Air Transport Association

Unit 8: Planning and Delivering Guided Tours

Unit reference number: **L/601/3346**

Level: **3**

Credit value: **8**

Guided learning hours: **60**

Unit aim

The aim of this unit is to provide learners with an understanding of the knowledge and skills that are required to act as a tour guide. The role is vital to both the domestic tourism industry and for guided tours overseas in assisting in the interpretation of the history and culture of the area. It supports the development of the skills required when responsible for coordinating and leading groups of people around tourist sites or places of interest.

Unit introduction

This unit will enable learners to develop the knowledge and skills needed to plan, conduct and evaluate guided tours.

Learners will consider the requirements for planning a guided tour. They will learn what to include in a commentary for both fixed route and interpretative guided tours, and how to present information in an interesting and stimulating way for participants. Learners will produce and adapt commentaries to meet differing customer needs and to ensure the success of the tour.

One of the key considerations in any planning process is the health, safety and security of all aspects of the tour. Learners will learn about risk assessments and use this knowledge to conduct risk assessments for guided tours. Health and safety is a crucial aspect of conducting a tour; learners will determine the course of action to take to deal with emergencies or problems. They will conduct tours in accordance with legislative requirements, deliver commentaries to groups, and brief participants to ensure their health and safety and the overall success of the tours.

In order to demonstrate that they fully understand the skills involved with tourist guiding, learners will evaluate their own performance, and that of others, and offer constructive comments that could lead to improvement.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Be able to plan guided tours	1.1	Plan and develop guided tours
	1.2	Produce commentaries for guided tours
	1.3	Outline the components of a successful tour
	1.4	Explain reasons for gaining the co-operation of information providers
	1.5	Explain constraints on information which may be given in a commentary
	1.6	Explain the importance of contextualising and adapting information to meet different customer requirements
	1.7	Explain the difference between a fixed route commentary and an interpretative commentary
	1.8	Explain the importance of using feedback to assist in the planning and development of an interpretative commentary
	1.9	Explain the importance of having plans that can be adapted to suit customer needs and local conditions
2 Be able to conduct guided tours	2.1	Undertake risk assessments of the tour route
	2.2	Conduct guided tours ensuring the health and safety of groups
	2.3	Deliver commentaries to groups
	2.4	Explain the importance of undertaking risk assessments of proposed tours
	2.5	Describe the courses of action to take in the event of an emergency or problem arising during guided tours

Learning outcomes	Assessment criteria	
	2.6	Outline the health and safety information that should be given to groups before a tour
	2.7	Explain the importance of briefing groups on local issues relevant to the tour
	2.8	Explain the importance of giving customers onward information for the end of the tour
	2.9	Explain the effects of legislation or organisational procedure on guided tours
3 Be able to evaluate guided tours	3.1	Analyse customer feedback
	3.2	Evaluate the effectiveness of guided tours
	3.3	Describe how to set success indicators for commentaries and tours
	3.4	Explain methods that can be used to collect feedback on tour commentaries
	3.5	Describe how to analyse feedback
	3.6	Explain the importance of self-evaluation
	3.7	Explain why feedback may be useful to others

Unit content

1 **Be able to plan guided tours**

Components: route; commentary; group cohesion; audibility

Reasons: copyright; goodwill; currency of information

Constraints: eg sensitive information, confidential addresses or locations, security details of a site, legal, organisational

Customer requirements: eg background, level of interest and expectations

Fixed route commentary: a route that follows given directions at all times eg within a facility, urban, rural or seaside area

Interpretative commentary: the information to be given to customers on a guided tour of an individual site, geographical area or a particular subject

Customer needs and local conditions: eg age, gender, culture, weather conditions, location

2 **Be able to conduct guided tours**

Health and safety: emergency procedures; safety hazards and potential risks en-route; personal safety; security of personal belongings, clothing and footwear

Issues: cultural; social; environmental

Onward information: where the customers' bus/coach will be to pick them up; times of local transport; methods of moving around the rest of the site; the duration of the tour for transport connections

Legislation or organisational procedures: eg equal opportunities, human rights, trade descriptions, DDA, RRA, fair trading, individual organisational procedures (eg National Trust)

3 **Be able to evaluate guided tours**

Methods: written, oral, self-evaluation

Feedback: customer, peer, self-evaluation

Others: manager, other guides

Essential guidance for tutors

Delivery

Some learners may already be working as tourist guides and it will be useful to start by sharing personal experiences of tourist guiding. This could include observations of tourist guides encountered on holiday excursions or in visitor attractions. Learners should be encouraged to consider what makes a good tourist guide, based on the group's shared experiences.

If learners have not already participated in a guided tour before the delivery of this unit, it would be useful to arrange for them to accompany a tour individually or as a group.

Although much of the unit is of a practical nature, it does require some theoretical input to each of the topics outlined in the unit content. This could be through lectures, handouts or presentations from guest speakers.

Following a theoretical introduction, it would be useful for learners to see how theories operate in practice, before considering their own ideas for guided tours. Here they could be presented with ideas for fixed route tours and asked to consider their content for different client groups.

Visiting speakers from tourist guiding organisations could be used to provide information on the planning and organisation of a guided tour. To assist learners in producing their own ideas for guided tours, they could first work through the process as a class or large group under the guidance of the tutor so that all considerations have been discussed.

When applying knowledge and understanding of risk assessments, learners could be provided with details of tours of an area they are familiar with and asked to complete a risk assessment. It would be useful to agree a common format for risk assessments and the centre's own health and safety officer may be able to advise learners on how to conduct these.

The unit develops the skills necessary to produce and deliver fixed route commentaries, so delivery should enable learners to take part in practical sessions as much as possible. Learners could accompany tour groups of prospective learners during open days and they could also accompany organised day trips or local walking tours for their peers. Learners should have the opportunity to practise delivering commentaries using both amplified and natural voice.

Learners should be presented with typical on-tour scenarios covering a wide range of issues, potential health and safety problems and emergency situations. They could work in groups to find appropriate solutions.

Throughout all practical sessions learners should have the opportunity to give and receive feedback on performance. This will enable them to develop the ability to give and receive constructive criticism.

It is recommended that all learners lead at least one group of people with a commentary before they undertake the formal assessment for this unit.

Assessment

The main focus of this unit is to demonstrate practical skills when planning and delivering guided tours. Those already working as tourist guides may be able to perform these tasks as part of their employment. Learners not yet in work will be required to undertake the tasks in simulated situations. Learners must also provide supporting written or verbal evidence to demonstrate that they have the underpinning knowledge and understanding for the practical activities. Examples of assessments are provided below.

Assessment criteria 1.3–1.9, 2.4–2.9, 3.3–3.7

These criteria could be assessed by producing a training manual or presentation aimed at new tourist guides.

To achieve 1.3, learners must outline the components of a successful tour as listed in the unit content.

To achieve 1.4, learners must explain reasons for gaining the cooperation of information providers as listed in the unit content.

To achieve 1.5, learners must explain at least three constraints on information which may be given in a commentary.

To achieve 1.6, learners must explain the importance of contextualising and adapting information to meet at least three different customer requirements.

To achieve 1.7, learners must explain the difference between a fixed route commentary and an interpretative commentary. Relevant examples should be given to support their explanation.

To achieve 1.8, learners must explain the importance of using feedback to assist in the planning and development of an interpretative commentary.

To achieve 1.9, learners must explain the importance of having plans that can be adapted to suit customer needs and local conditions, including at least four of the items listed in the unit content.

2.4, 2.5 and 2.6 are linked to health and safety and can be addressed together.

To achieve 2.4, learners must explain the importance of undertaking risk assessments of proposed tours. To achieve 2.5, learners must describe the courses of action (emergency procedures) to take in the event of an emergency or problem arising during guided tours. To achieve 2.6, learners must outline the health and safety information that should be given to groups before a tour, as detailed in the unit content.

To achieve 2.7, learners must explain the importance of briefing groups on local issues, relevant to the tour including cultural, social and environmental issues.

To achieve 2.8, learners must explain the importance of giving customers onward information for the end of the tour. All items listed in the unit content must be addressed.

To achieve 2.9, learners must explain the effects of legislation or organisational procedures on guided tours. The focus must be on explaining the effects of a total of at least three current pieces of legislation or specific organisational procedures, rather than merely explaining the laws and procedures.

To achieve 3.3, learners must describe how to set success indicators for commentaries and tours by using different methods of feedback.

To achieve 3.4, learners must explain methods that can be used to collect feedback on tour commentaries, including oral, written and self-evaluation from customers and peers.

To achieve 3.5, learners must describe how to analyse feedback from customers.

To achieve 3.6, learners must explain the importance of self-evaluation.

To achieve 3.7, learners must explain why feedback may be useful to others, including managers and other guides.

Assessment criteria 1.1–1.2, 2.1–2.3, 3.1–3.2

Learners must complete two practical assessments for this unit.

To achieve 1.1, learners must plan and develop two guided tours. Detailed itineraries should be provided.

To achieve 1.2, learners must produce commentaries for two guided tours. Learners should provide evidence of research and notes for the commentaries. It is not expected that learners would produce transcripts of commentaries to be delivered verbatim.

To achieve 2.1, learners must undertake risk assessments of the tour route for two guided tours and submit simple risk assessments as evidence.

To achieve 2.2, learners must conduct two guided tours, ensuring the health and safety of groups.

To achieve 2.3, learners must deliver commentaries to groups on two guided tours. Detailed observation records or witness statements must be provided to indicate exactly how learners have achieved 2.1 and 2.2.

To achieve 3.1, learners must analyse customer feedback on two guided tours. Copies of feedback forms or other documentation should be included as supporting evidence.

To achieve 3.2, learners must evaluate the effectiveness of two guided tours using at least two methods of feedback.

Essential resources

A qualified tourist guide such as a 'Blue Badge Guide' would be able to provide insight into the working practices of guides and the legislative framework in which they operate. Visits to destinations, heritage sites etc are essential in order to gain practical experience of tourist guiding.

Indicative resource materials

Textbook

Reily Collins V – *Becoming a Tour Guide* (Continuum, 2000) ISBN 9780826447883

Journals

- *Travel Trade Gazette* **–** Reed Business Information
- *Travel Weekly* **–** CNP Information

Other

Local and regional guidebooks

Unit 9: Worldwide Travel and Tourism Destinations

Unit reference number: K/601/3371

Level: 3

Credit value: 15

Guided learning hours: 141

Unit aim

The aim of this unit is to develop the candidate's knowledge and skills so they can locate important tourist destinations worldwide, and interpret information needed for travel.

Unit introduction

Having a good working knowledge of different destinations is crucial for many job roles in the travel and tourism sector. Whether learners are considering a new career in travel and tourism or looking for promotion, their customers and colleagues will rely on them to source and interpret information on destinations with confidence and accuracy.

This unit focuses on developing learners' knowledge and understanding of worldwide travel and tourism destinations. They will examine the destination life cycle and how trends impact on destination product planning. This will enable them to appreciate that destinations do not 'stand still' and that regions, resorts and attractions must respond to changing trends.

Learners will explore the different regions and destinations around the world, and investigate how attractions, transport routes and physical features play their part in attracting different types of tourists to different countries. Learners will provide basic tourist information and examine how destinations cater for their visitors' needs, highlighting the benefits and limitations of provision.

On completion of this unit learners will have further developed their product knowledge of worldwide destinations and their ability to locate and interpret information on a wide range of travel and tourism destinations.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the principles affecting product planning to worldwide destinations	1.1 Explain the tourism destination life cycle
	1.2 Explain how trends of tourist visits impact on destination product planning
2 Understand Europe as a tourist destination	2.1 Locate tourist destinations and regions
	2.2 Locate tourist attractions
	2.3 Describe the type of visitor the main tourist attractions attract
	2.4 Describe the main physical features
	2.5 Outline essential tourist information for European countries
	2.6 Explain the benefits and limitations of European destinations in relation to customer needs
	2.7 Identify major transport routes from the UK
3 Understand the Americas as a tourist destination	3.1 Locate tourist destinations and regions
	3.2 Locate tourist attractions
	3.3 Describe the type of visitor the main tourist attractions attract
	3.4 Describe the main physical features
	3.5 Outline essential tourist information for countries in the Americas
	3.6 Explain the benefits and limitations of destinations in the Americas
	3.7 Identify major transport routes from the UK

Learning outcomes	Assessment criteria
4 Understand Africa and the Middle East as a tourist destination	4.1 Locate tourist destinations and regions
	4.2 Locate tourist attractions
	4.3 Describe the type of visitor the main tourist attractions attract
	4.4 Describe the main physical features
	4.5 Outline essential tourist information for countries in Africa and the Middle East
	4.6 Explain the benefits and limitations of destinations for countries in Africa and the Middle East
	4.7 Identify major transport routes from the UK
5 Understand Australasia and Oceania as a tourist destination	5.1 Locate tourist destinations and regions
	5.2 Locate tourist attractions
	5.3 Describe the type of visitor the main tourist attractions attract
	5.4 Describe the main physical features
	5.5 Outline essential tourist information for countries in Australasia and Oceania
	5.6 Explain the benefits and limitations of destinations in Australasia and Oceania
	5.7 Identify major transport routes from the UK
6 Understand Asia as a tourist destination	6.1 Locate tourist destinations and regions
	6.2 Locate tourist attractions
	6.3 Describe the type of visitor the main tourist attractions attract
	6.4 Describe the main physical features
	6.5 Outline essential tourist information for countries in Asia
	6.6 Explain the benefits and limitations of destinations in Asia
	6.7 Identify major transport routes from the UK

Unit content

1 **Understand the principles affecting product planning to worldwide destinations**

Destination product planning: destinations (resorts, regions, attractions); stages of the destination life cycle (Butler); trends (increase/decrease in visitor numbers, length of stay, visitor profiles, motivations, special interests; all inclusive); product planning (marketing, product development, sustainable tourism)

2 **Understand Europe as a tourist destination**

Tourist destinations: countries; states; capitals; cities; tourist resorts/centres; winter sport and summer sport destinations; special interest

Regions: landscape; climatic (weather, temperature, rainfall, sunshine, altitude); political

Europe: Northern Europe: Denmark; Finland; Iceland; Ireland; Norway; Sweden; United Kingdom; Western Europe: Austria; Belgium; France; Germany; Liechtenstein; Luxembourg; Monaco; the Netherlands; Switzerland; Central/Eastern Europe: Armenia; Azerbaijan; Belarus; Bulgaria; Czech Republic; Estonia; Former USSR; Georgia; Hungary; Kazakhstan; Latvia; Lithuania; Poland; Republic of Moldova; Romania; Russian Federation; Slovakia; Tajikistan; Turkmenistan; Ukraine; Uzbekistan; Southern Europe; Albania; Andorra; Bosnia-Herzegovina; Croatia; former Yugoslav Republic of Macedonia; Greece; Italy; Malta; Portugal; San Marino; Serbia; Montenegro; Slovenia; Spain; Eastern Mediterranean Europe: Cyprus; Israel; Turkey

Attractions: natural (coastal); man-made (historic); cultural (customs, religious, arts and entertainment); other (rural, urban, wildlife, special events)

Physical features: oceans; seas; mountains; mountain ranges; rivers; lakes; falls; plains and deserts

Essential tourist information: currencies; cost of living; health; languages; time zones; food

Benefits and limitations: in terms of cost, accessibility, facilities

Transport routes: land; sea; waterways; air; gateways

Trends: statistical data from charts, graphs, tables

3 **Understand the Americas as a tourist destination**

Tourist destinations: countries; states; capitals; cities; tourist resorts/centres; winter sport and summer sport destinations; special interest

Regions: landscape; climatic (weather, temperature, rainfall, sunshine, altitude); political

Americas: North America (USA, Canada); USA: Florida; California; New York; Pacific Islands; Las Vegas; Canada: Ontario; Quebec; British Columbia; Alberta; Mexico and Caribbean: Mexico; Anguilla; Antigua and Barbuda; Aruba; Islands of Bahamas; Barbados; Belize; Bermuda; Bonaire; British Virgin Islands; Cancun/Riviera Maya/Cozumel (Mexican Caribbean); Cayman Islands; Cuba; Curacao; Dominica; Dominican Republic; Grenada; Guadeloupe; Guyana; Haiti; Jamaica; Martinique; Montserrat; Puerto Rico; St Barthelemy; St Kitts and Nevis; St Lucia; St Maarten; St Vincent and the Grenadines; Suriname; Trinidad and Tobago; Turks and Caicos; US Virgin Islands; Central: Belize; Costa Rica; El Salvador; Guatemala; Honduras; Nicaragua; Panama; South America: Argentina; Bolivia; Brazil; Chile; Colombia; Ecuador; Guyana; Paraguay; Peru; Uruguay; Venezuela

Attractions: natural (coastal); man-made (historic); cultural (customs, religious, arts and entertainment); other (rural, urban, wildlife, special events)

Physical features: oceans; seas; mountains; mountain ranges; rivers; lakes; falls; plains and deserts

Essential tourist information: currencies; cost of living; health; languages; time zones; food

Benefits and limitations: in terms of cost, customer needs, accessibility, facilities

Transport routes: land; sea; waterways; air; gateways

Trends: statistical data from charts, graphs, tables

4   Understand Africa and the Middle East as a tourist destination

Tourist destinations: countries; states; capitals; cities; tourist resorts/centres; winter sport and summer sport destinations; special interest

Regions: landscape; climatic (weather, temperature, rainfall, sunshine, altitude); political

Africa and Middle East: bordering the Mediterranean: Egypt; North African Coast: Tunisia, Algeria, Morocco, Libya, Syria; Middle East: Bahrain; Iraq; Jordan; Kuwait; Lebanon; Oman; Palestine; Qatar; Saudi Arabia; United Arab Emirates; Yemen; West Africa: Benin; Burkina Faso; Cape Verde; Ivory Coast; Gambia; Ghana; Guinea; Guinea-Bissau; Mali; Mauritania; Nigeria; Senegal; Sierra Leone; Togo; Central Africa: Angola; Cameroon; Central Africa Republic; Chad; Congo; Democratic Republic of Congo; Gabon; East Africa: Burundi; Comoros; Djibouti; Eritrea; Ethiopia; Kenya; Madagascar; Malawi; Mauritius; Reunion; Rwanda; Seychelles; Tanzania; Uganda; Zambia; Zimbabwe; South Africa: Botswana; Lesotho; Namibia; South Africa; Swaziland

Attractions: natural (coastal); man-made (historic); cultural (customs, religious, arts and entertainment); other (rural, urban, wildlife, special events)

Physical features: oceans; seas; mountains; mountain ranges; rivers; lakes; falls; plains and deserts

Essential tourist information: currencies; cost of living; health; languages; time zones; food

Benefits and limitations: in terms of cost, customer needs, accessibility, facilities

Transport routes: land; sea; waterways; air; gateways

Trends: statistical data from charts, graphs, tables

5 Understand Australasia and Oceania as a tourist destination

Tourist destinations: countries; states; capitals; cities; tourist resorts/centres; winter sport and summer sport destinations; special interest

Regions: landscape; climatic (weather, temperature, rainfall, sunshine, altitude); political

Australasia and Oceania: Australasia (Australia and New Zealand); Pacific Islands; Hawaiian islands: Kauai; Oahu; Maui; Hawaii; Molokai; Lanai; Niihau; Kahoolawe; Micronesia: Guam; Kiribati; Marshall Islands; Federated States of Micronesia; Palau; Melanesia: Papua New Guinea; Solomon Islands; Vanuatu; New Caledonia; Fiji; Vanuatau; Polynesia: Cook Islands; French Polynesia; Easter Islands; Galapagos; Tuvalu; Tokelau; Samoa; Niue; Tonga; Society Islands; Tuamotu; Tubuai

Attractions: natural (coastal); man-made (historic); cultural (customs, religious, arts and entertainment); other (rural, urban, wildlife, special events)

Physical features: oceans; seas; mountains; mountain ranges; rivers; lakes; falls; plains and deserts

Essential tourist information: currencies; cost of living; health; languages; time zones; food

Benefits and limitations: in terms of cost, customer needs, accessibility, facilities

Transport routes: land; sea; waterways; air; gateways

Trends: statistical data from charts, graphs, tables

6 Understand Asia as a tourist destination

Tourist destinations: countries; states; capitals; cities; tourist resorts/centres; winter sport and summer sport destinations; special interest

Regions: landscape; climatic (weather, temperature, rainfall, sunshine, altitude); political

Asia: South East Asia: Brunei; Cambodia; Indonesia; Laos; Malaysia; Myanmar; Philippines; Singapore; Thailand; Vietnam; North East Asia: Japan; China; Hong Kong; Macau; Taiwan; South Korea; North Korea; Mongolia; South Asia: Bangladesh; Bhutan; India; Iran; Maldives; Nepal; Pakistan; Sri Lanka

Attractions: natural (coastal); man-made (historic); cultural (customs, religious, arts and entertainment); other (rural, urban, wildlife, special events)

Physical features: oceans; seas; mountains; mountain ranges; rivers; lakes; falls; plains and deserts

Essential tourist information: currencies; cost of living; health; languages; time zones; food

Benefits and limitations: in terms of cost, customer needs, accessibility, facilities

Transport routes: land; sea; waterways; air; gateways

Trends: statistical data from charts, graphs, tables

Essential guidance for tutors

Delivery

It is expected that learners will have some prior knowledge of worldwide destinations and that they will already be reasonably competent when sourcing information on destinations. The unit has not been designed to assess basic geographical features as these are assessed at levels 1 and 2, however some revision may be appropriate for some learners. The unit will develop learners' ability to interpret information from various sources to provide a supportive and proactive service to customers and colleagues. Learners in the workplace may be working at a more senior or supervisory level and may provide a supportive role to junior members of staff.

Learners must be introduced to the concept of the destination life cycle. This may be introduced at an early stage in delivery, using a model such as Butler's. Learners need only have a general understanding of the different stages of the destination life cycle. Rather than examining this in some depth at the outset, it is recommended that this concept be revisited from time to time during the delivery of the unit in the context of specific destinations that are being researched. Learners need to be aware of trends relating to tourist visits and how these can impact on destination product planning. Learners should be encouraged to examine visitor trends and statistics while carrying out research into destinations. The World Tourism Organization (WTO) and National Tourist Board websites can be useful sources of such information.

The unit content suggests that it might be best to approach delivery in a structured way by area, ie Europe, the Americas, Africa and the Middle East, Australasia and Oceania, Asia. These areas have been specified by the World Tourism Organization (WTO) and they may be studied in any order. The unit does not address the UK in any depth and learners wishing to develop an in-depth knowledge of the UK should study the separate units at Level 3 on England, Ireland, Scotland and Wales.

Learners should be introduced to different resources at an early stage of delivery and should not become over-reliant on the internet as a resource. Tutors should have a range of European and worldwide holiday brochures available for learners' use. Practical activities should be devised to develop proficiency and efficiency when using atlases, brochures, leaflets, guide books, trade manuals and websites to source information on regional aspects, destinations, attractions, transport routes and essential tourist information, as stipulated in the unit content. Learners in the workplace may have many of these resources readily accessible. Discussions should be used to examine specific destinations in more depth, and particularly to identify strengths and weaknesses, for example in terms of cost, accessibility and facilities.

Tourist board DVDs and TV travel programmes can be used to help learners to identify the differences between tourist destinations around the world and to recognise their special features. Holiday brochures are particularly useful as they highlight the key features of different destinations and can include excellent photographs. Google Earth is excellent for adding yet another visual dimension. Learners should be able to connect key attractions to specific destinations and use photos to confirm their knowledge. Various online tests are available for learners to test their ability to locate countries and destinations accurately and speedily.

Learners must address all of the content listed but should also research widely, particularly to develop their knowledge of new and emerging destinations. It is expected that at this level some knowledge of tourist destinations, major cities, attractions and physical features in different areas will be retained and therefore short tests can be used to consolidate learning.

Assessment

Within this unit learners will need to demonstrate that they have the knowledge and skills required to locate important tourist destinations worldwide, and to interpret information needed for travel. Those already working in certain areas of the travel and tourism sector may be able to provide some of the evidence as part of their employment. Learners not yet in work will need to provide written or verbal evidence to demonstrate that they have an understanding of worldwide travel and tourism destinations. It is expected that learners will have prior knowledge of worldwide destinations and that resources will be used competently, as appropriate in a working environment, to confirm accuracy and to source factual information.

Assessment criteria 1.1, 1.2

To achieve 1.1, learners must explain the tourism destination life cycle. This should be in general terms to demonstrate an understanding of the different stages involved. A diagram such as Butler's Destination Life Cycle could be used, supported by a simple written explanation of the different stages. Learners should attempt to provide at least one example of a destination at each of the life cycle stages.

To achieve 1.2, learners must explain how trends of tourist visits impact on destination product planning. The explanation may be in general terms but should be supported by examples and statistical data relating to at least two trends and their impact on product planning in named destinations.

The evidence for 1.1 and 1.2 could be presented in written format or as a short presentation, for example delivering a training session to staff.

Assessment criterion 2.1

To achieve 2.1, learners must locate tourist destinations and regions in Europe. As a minimum they should locate the countries of Northern Europe and Western Europe as listed in the unit content, plus Bulgaria, Czech Republic, Estonia, Russian Federation, Hungary, Latvia, Lithuania, Poland, Croatia, Greece, Italy, Malta, Portugal, Slovenia, Spain, Cyprus, Turkey.

Additionally they must locate at least five capital cities, five city break destinations, five tourist resorts, five winter sport and five special interest destinations in Europe. Learners should be encouraged to span their choices over a wide spread of countries. Specific destinations should not be used more than once, for example the city break destinations must not be the same as any of the capital cities. Learners should highlight landscape differences within Europe, climatic variations and general political aspects, for example the scope of EU membership.

Evidence for 2.1 could be provided in a number of ways, for example map work, presentation, workplace situations or a mixture of these.

Assessment criteria 2.2, 2.3, 2.4, 2.5, 2.6, 2.7

Learners may focus on two European countries for assessment criteria 2.2, 2.3, 2.4, 2.5, 2.6 and 2.7.

To achieve 2.2, learners must locate tourist attractions in the two selected countries, including at least one example each of natural, man-made, cultural and 'other' (for example wildlife or special event). These should be significant attractions in order to support achievement of 2.3, where learners must briefly describe the type of visitors the main tourist attractions attract.

To achieve 2.4, learners must briefly describe the main physical features of the two selected countries, providing examples of oceans, seas, mountains, mountain ranges, rivers, lakes, waterfalls and deserts, as relevant to the countries they have selected.

To achieve 2.5, learners must outline essential tourist information for two European countries, including currency, cost of living, health, languages, time zones and food.

To achieve 2.6, learners must explain the benefits and limitations of their two country destinations in relation to customer needs, including cost, accessibility and facilities.

To achieve 2.7, learners must identify major transport routes from the UK to the two countries, including land, sea, waterways, air, gateways as relevant.

All the above assessment criteria (2.1 to 2.7) can be presented in written or verbal format. Evidence gained from workplace situations must be supported by detailed witness statements, computer printouts, emails etc to ensure that achievement of individual criteria is clearly recorded. Presentations should be supported by detailed observation records to confirm how criteria have been achieved, plus slides, notes and handouts.

Assessment criterion 3.1

To achieve 3.1, learners must locate tourist destinations and regions in the Americas. As a minimum they should locate the countries of USA, Canada, Mexico, plus five Central or South American countries and five Caribbean islands that are popular with the ex-UK market.

Additionally they must locate five capital cities, five city break destinations, five tourist resorts or centres, five winter sport and five special interest destinations. Learners should be encouraged to cover a wide spread of countries, and the specific destinations should not be used more than once, for example the city destinations must not be the same as any of the capital cities. City break destinations may be those that would form part of a multi-centre tour. Learners should highlight landscape differences within the Americas, climatic variations and general political aspects.

Evidence for 3.1 could be provided in a number of ways, for example map work, presentation, workplace situations or a mixture of these.

Assessment criteria 3.2, 3.3, 3.4, 3.5, 3.6, 3.7

Learners may focus on two countries in the Americas for assessment criteria 3.2, 3.3, 3.4, 3.5, 3.6 and 3.7.

To achieve 3.2, learners must locate tourist attractions in the two selected countries, including at least one example each of natural, man-made, cultural and 'other' (for example wildlife or special event). These should be significant attractions in order to support achievement of 3.3, where learners must briefly describe the type of visitors the main tourist attractions attract.

To achieve 3.4, learners must briefly describe the main physical features of their selected countries, providing examples of oceans, seas, mountains, mountain ranges, rivers, lakes, waterfalls and deserts, as relevant to the countries they have selected.

To achieve 3.5, learners must outline essential tourist information for two countries in the Americas, including currency, cost of living, health, languages, time zones and food.

To achieve 3.6, learners must explain the benefits and limitations of their two country destinations in relation to customer needs, including cost, accessibility and facilities.

To achieve 3.7, learners must identify major transport routes from the UK to the two countries, including land, sea, waterways, air, gateways as relevant.

All the above assessment criteria (3.1 to 3.7) can be presented in written or verbal format. Evidence gained from workplace situations must be supported by detailed witness statements, computer printouts, emails etc to ensure that achievement of individual criteria is clearly recorded. Presentations should be supported by detailed observation records to confirm how criteria have been achieved, plus slides, notes and handouts.

Assessment criterion 4.1

To achieve 4.1, learners must locate tourist destinations and regions in Africa and the Middle East. As a minimum they should locate the countries of Egypt, Tunisia, Morocco, Jordan, Syria, Saudi Arabia, United Arab Emirates, Cape Verde, Gambia, Ghana, Kenya, Mauritius, Seychelles, Tanzania, Zambia, Zimbabwe, South Africa, Botswana.

Additionally they must locate five capital cities, five city break destinations, five tourist resorts or centres and five special interest destinations. Learners should be encouraged to cover a wide spread of countries, and the specific destinations should not be used more than once, for example the city break destinations must not be the same as any of the capital cities. City break destinations may be those that would form part of a multi-centre tour. Learners should highlight landscape differences within Africa and the Middle East, climatic variations and general political aspects.

Evidence for 4.1 could be provided in a number of ways, for example map work, presentation, workplace situations or a mixture of these.

Assessment criteria 4.2, 4.3, 4.4, 4.5, 4.6, 4.7

Learners may focus on two countries for assessment criteria 4.2, 4.3, 4.4, 4.5, 4.6 and 4.7, of which one should be in Africa and one in the Middle East.

To achieve 4.2, learners must locate tourist attractions in the two selected countries, including at least one example each of natural, man-made, cultural and 'other' (for example wildlife or special event). These should be significant attractions in order to support achievement of 4.3, where learners must briefly describe the type of visitors the main tourist attractions attract.

To achieve 4.4, learners must briefly describe the main physical features of the two selected countries, providing examples of oceans, seas, mountains, mountain ranges, rivers, lakes, waterfalls and deserts, as relevant to the countries they have selected.

To achieve 4.5, learners must outline essential tourist information for two countries in Africa and the Middle East, including currency, cost of living, health, languages, time zones and food.

To achieve 4.6, learners must explain the benefits and limitations of their two country destinations in relation to customer needs, including cost, accessibility and facilities.

To achieve 4.7, learners must identify major transport routes from the UK to the two countries, including land, sea, waterways, air, gateways as relevant.

All the above assessment criteria (4.1 to 4.7) can be presented in written or verbal format. Evidence gained from workplace situations must be supported by detailed witness statements, computer printouts, emails etc to ensure that achievement of individual criteria is clearly recorded. Presentations should be supported by detailed observation records to confirm how criteria have been achieved, plus slides, notes and handouts.

Assessment criterion 5.1

To achieve 5.1, learners must locate tourist destinations and regions in Australasia and Oceania. As a minimum they should locate the countries of Australia, New Zealand and the islands/island groups of Hawaii, Polynesia, Papua New Guinea, Galapagos, Easter Islands, Fiji.

Additionally they must locate the capital cities of Australia and New Zealand, five city break destinations, five tourist resorts/centres, two winter sport and five special interest destinations. Learners should be encouraged to cover a wide spread of countries, and the specific destinations should not be used more than once, for example the city break destinations must not be the same as any of the capital cities. City break destinations may be those that would form part of a multi centre tour. Learners should highlight landscape differences within Australasia and Oceania, climatic variations and general political aspects.

Evidence for 5.1 could be provided in a number of ways, for example map work, presentation, workplace situations or a mixture of these.

Assessment criteria 5.2, 5.3, 5.4, 5.5, 5.6, 5.7

Learners may focus on two countries or islands/island groups for assessment criteria 5.2, 5.3, 3.4, 5.5, 5.6 and 5.7, of which one should be in Australasia and one in Oceania.

To achieve 5.2, learners must locate tourist attractions in the two selected countries, including at least one example each of natural, man-made, cultural and 'other' (for example wildlife or special event). These should be significant attractions in order to support achievement of 5.3, where learners must briefly describe the type of visitors the main tourist attractions attract.

To achieve 5.4, learners must briefly describe the main physical features of the two selected countries, providing examples of oceans, seas, mountains, mountain ranges, rivers, lakes, waterfalls and deserts, as relevant to the countries they have selected.

To achieve 5.5, learners must outline essential tourist information for two countries in Australasia and Oceania, including currency, cost of living, health, languages, time zones and food.

To achieve 5.6, learners must explain the benefits and limitations of their two country destinations in relation to customer needs, including cost, accessibility and facilities.

To achieve 5.7, learners must identify major transport routes from the UK to the two countries, including land, sea, waterways, air, gateways as relevant.

All the above assessment criteria (5.1 to 5.7) can be presented in written or verbal format. Evidence gained from workplace situations must be supported by detailed witness statements, computer printouts, emails etc to ensure that achievement of individual criteria is clearly recorded. Presentations should be supported by detailed observation records to confirm how criteria have been achieved, plus slides, notes and handouts.

Assessment criterion 6.1

To achieve 6.1, learners must locate tourist destinations and regions in Asia. As a minimum they should locate the countries of Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand, Vietnam, Japan, China, Hong Kong, India, Maldives, Nepal, Pakistan, Sri Lanka.

Additionally they must locate five capital cities, five city break destinations, five tourist resorts, two winter sport and five special interest destinations. Learners should be encouraged to cover a wide spread of countries, and the specific destinations should not be used more than once, for example the city break destinations must not be the same as any of the capital cities. City break destinations may be those that would form part of a multi-centre tour. Learners should highlight landscape differences within Asia, climatic variations and general political aspects.

Evidence for 6.1 could be provided in a number of ways, for example map work, presentation, workplace situations or a mixture of these.

Assessment criteria 6.2, 6.3, 6.4, 6.5, 6.6, 6.7

Learners may focus on two countries in Asia for assessment criteria 6.2, 6.3, 6.4, 6.5, 6.6 and 6.7.

To achieve 6.2, learners must locate tourist attractions in the two selected countries, including at least one example each of natural, man-made, cultural and 'other' (for example wildlife or special event). These should be significant attractions in order to support achievement of 6.3, where learners must briefly describe the type of visitors the main tourist attractions attract.

To achieve 6.4, learners must briefly describe the main physical features of the two selected countries, providing examples of oceans, seas, mountains, mountain ranges, rivers, lakes, waterfalls and deserts, as relevant to the countries they have selected.

To achieve 6.5, learners must outline essential tourist information for two countries in Asia, including currency, cost of living, health, languages, time zones and food.

To achieve 6.6, learners must explain the benefits and limitations of their two country destinations in relation to customer needs, including cost, accessibility and facilities.

To achieve 6.7, learners must identify major transport routes from the UK to the two countries, including land, sea, waterways, air, gateways as relevant.

All the above assessment criteria (6.1 to 6.7) can be presented in written or verbal format. Evidence gained from workplace situations must be supported by detailed witness statements, computer printouts, emails etc to ensure that achievement of individual criteria is clearly recorded. Presentations should be supported by detailed observation records to confirm how criteria have been achieved, plus slides, notes and handouts.

Essential resources

Learners should have access to atlases, holiday brochures, travel directories, guide books and the internet for both research and assessment purposes. Tourist board DVDs and promotional materials will be useful.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

Tourist Attractions and Events of the World (Columbus, 2005)
ISBN 9781902221915

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006)
ISBN 9781902221939

Boniface B and Cooper C – *Worldwide Destinations: Geography of Travel and Tourism* (Butterworth-Heinemann, 2004) ISBN 9780750659970

Journals, magazines and guides

ABTA magazine

DG&G Guides

Holiday Which?

Insights

Institute of Travel and Tourism newsletters

Leisure Management

Selling Long Haul magazine

The Tourism Society newsletters

Tourism Concern

Tourism Journal

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

There are so many websites on worldwide destinations that it is impossible to provide a definitive list. Country tourist board websites will contain relevant factual and promotional information for travel to particular destinations.

earth.google.com	Google Earth
www.bugbog.com	Independent destination finder
www.fco.gov.uk	Foreign and Commonwealth Office
www.gazetteers.com	DG&G Guides
www.lizardpoint.com/fun/geoquiz	Travel geography quiz
www.lonelyplanet.co.uk	Country information and discussion boards
www.multimap.com	Online atlas
www.nationalgeographic.com/travel	Travel guide site
www.towd.com	Tourism Offices Worldwide Directory
www.world-tourism.org	World Tourism Organization Statistical Service
www.worldtravelguide.net	Worldwide destination guide
www.wto.org	World Tourism Organization

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Unit 10: Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism

Unit reference number: **L/600/1066**

Level: **3**

Credit value: **2**

Guided learning hours: **20**

Unit aim

This unit will provide in-depth knowledge of how to supervise customer service performance in the hospitality, leisure, travel and tourism sector. The unit will be appropriate for supervisors and managers whose responsibilities include managing staff.

Unit introduction

Customer service is of vital importance to all organisations in the hospitality, leisure, travel and tourism sector. A reputation for excellent customer service performance will help organisations to differentiate themselves from their competitors, and so attract and retain customers. Supervisors are an important factor in ensuring the continuity of an effective and positive customer service culture within an organisation.

This unit looks at how a supervisor can help to develop customer service in their business, the relationship between customer service and selling and the impact of customer service on business performance.

Learners will explore the role of the supervisor in providing customer service and their part in building teams to deliver effective customer service. The importance of staff development, training, coaching and different methods of giving feedback on customer service are also explored. Finally, the unit allows learners to investigate how effective customer service has been, by measuring it against customer service standards and suggesting improvements that might be implemented.

This unit builds on the level 2 unit T600/1059: *Principles of Customer Service in Hospitality, Leisure, Travel and Tourism* (Unit 2 in this specification).

Through completion of this unit, learners will be able to appreciate the vital role they play as supervisors or potential supervisors in the hospitality, leisure, travel and tourism sector, in contributing to customer service quality.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand how to develop a customer service culture within their business	1.1	Describe the role of the supervisor in leading by example when delivering excellent customer service
	1.2	Explain the impact of customer service on the performance of the business
	1.3	Explain the relationship between delivering customer service and selling services
	1.4	Identify and apply good practice techniques to monitor the delivery of customer service against organisational standards
2 Understand how to build teams and motivate colleagues through techniques such as on-site coaching	2.1	Analyse how effective teams can be developed to deliver excellent customer service
	2.2	Explain the importance of staff development in ensuring that excellent customer service is delivered
	2.3	Describe the role of the supervisor in developing teams
	2.4	Describe how training and coaching sessions can be implemented to improve the delivery of customer service
	2.5	Describe the importance of providing feedback to staff
	2.6	Apply appropriate methods to deliver feedback to staff

Learning outcomes	Assessment criteria	
3 Understand how to effectively monitor and communicate levels of customer service performance	3.1	Analyse the importance of developing and implementing clear customer service standards
	3.2	Describe appropriate ways in which supervisors can monitor and measure the performance of team members
	3.3	Describe appropriate corrective actions that can be taken to resolve failures in the delivery of customer service
	3.4	Explain how performance against customer service standards can be recorded and communicated
	3.5	Identify ways in which measurement of the effectiveness of customer service can be used to improve future performance

Unit content

1 **Understand how to develop a customer service culture within their business**

Role of the supervisor in customer service: leading by example; demonstration of good customer service skills; setting and monitoring standards for personal presentation; knowledge of products and services; communication and listening skills; setting team goals; positive attitude; motivating staff

Customer service and business performance: customer loyalty; repeat business; increased sales and usage, increased market share; enhanced public image; new customers; reduced complaints; reduced staff turnover; job satisfaction

Customer service and selling: product knowledge; providing information or advice; identifying, meeting and exceeding customer needs; repeat business; increased sales

Monitor delivery of customer service: organisational standards; customer charter; performance indicators; repeat business; new customers; enhanced public image; customer satisfaction; monitoring techniques (mystery shoppers, comment cards, observation); complaints analysis

2 **Understand how to build teams and motivate colleagues through techniques such as on-site coaching**

Develop effective teams: recruitment; induction; motivation; training; team goals; individual team goals; team knowledge; team dynamics; effective communication; retention of team members; awareness of threats to team development (high member turnover, weak or authoritarian leadership, poor definition of goals); monitoring against service standards; mutual cooperation and support

Importance of staff development: planning; awareness of team members' strengths, weaknesses and sensitivities; conduct of appraisal interviews; induction and training; development of product knowledge; development of skills; knowledge of company procedures; knowledge of health, safety and legislative requirements

Role of the supervisor: ability to motivate and lead a team; ability to take initiative; ability to defuse and resolve conflict; fairness in decision making; identifying staff training and development needs; assessing performance; providing support

Implementation of training and coaching: to improve customer service; group or individual training (on-site or off-site); individual on-site coaching; mentoring; observation

Importance of providing feedback: positive and negative; to motivate; maintain team focus; identify training needs; target setting

Methods of providing feedback: formal; informal; meetings; staff appraisal; staff newsletter; email

3 **Understand how to effectively monitor and communicate levels of customer service performance**

Importance of developing and implementing customer service standards: customer service standards (service levels, procedures for complaints, compliance with legislation and codes of practice, clear, measurable, written and accessible, appropriate to product or service); implement standards by training staff; standardisation across organisation; consistency in level of service provided; transparency

Monitor and measure team performance: customer feedback (surveys, informal comments, complaints); financial data (turnover, repeat business); appraisals; key performance indicators; team objectives; mystery shopper; self-assessment; SWOT analysis

Corrective action: support and development of under-performing team members; revise team responsibilities; review and evaluate team-working arrangements; training; disciplinary action

Recording and communicating performance: performance set at staff appraisal; self-evaluate; standards checklists; customer feedback; appraisal documentation, communicating performance eg appraisal interview; team meeting

Improving future performance: of the operation (efficiency, staff training, staff levels, employee of the month); of the products and services offered (quality, range, price, assessment criteria of loyalty schemes)

Essential guidance for tutors

Delivery

Much of the delivery for the unit relies on learners sharing their experience in classroom or workplace discussions and group work.

The main focus of the unit should be on supervision of customer service performance in organisations within travel and tourism component industries. This could include travel agents (retail, business, call centre, web-based), tour operations, transport providers, visitor attractions or hospitality providers.

Investigating how some organisations prioritise customer service culture in their business will put the unit into context for learners who may have different experiences of customer service. Company websites are an effective way of looking at how companies portray themselves. Learners in the workplace will be able to draw on their own company's approach to customer service too.

Learners will explore the role of the supervisor in helping to develop a customer service culture within their business. Discussions should generate examples of best practice in terms of team leadership skills, product knowledge, customer service skills, selling skills, personal presentation, attitude and monitoring techniques, and how these support the organisation's objectives. Copies of customer service standards that have been developed and used by companies would be useful when discussing organisational standards and how the delivery of customer service could be monitored. For learners in the workplace, internal briefings and talks from senior staff should support delivery.

Learners should examine the part played by the supervisor in team building and staff motivation. The internet is a valuable source of theoretical aspects of teamwork and how to build an effective team. TV 'fly on the wall' programmes showing teams operating in the workplace can provide useful materials for discussion. Group discussions can help to highlight how teams can be effective and the vital role played by the team leader in ensuring team success. Some tutor input would be valuable to consolidate understanding. A visit to the training department of a large organisation or input from a learner's own organisation's training department could give learners relevant and up-to-date information on training and staff development issues. Learners should share experiences of good and bad feedback. Although the unit is largely theoretical, learners could be given the opportunity to develop presentation skills, or see themselves on video when giving feedback to colleagues/team members in a role-play situation. Feedback could be given at a team meeting or on an individual basis.

Case studies could be used as a basis for discussions on monitoring and measuring team performance and taking corrective action, how this can be recorded and how it can be used to improve future performance. It would be useful for learners to be introduced to the SMART principle when developing customer service standards and setting targets for future performance. Examination of documentation used for appraisals, self-evaluation etc should take place. Learners should review how customer feedback, performance data etc are used by different organisations to measure team and individual performance, for example customer feedback forms,

sales and conversion targets. Learners should discuss how this can impact on future performance at an individual and organisational level. While the experience of learners is relevant, guest speakers from the sector would give an inside management perspective on the subject.

Through delivery of this unit learners may reflect on how they could improve their behaviour, communication and leadership skills in order to improve the overall customer service experience, which is at the heart of the travel and tourism sector.

Assessment

A portfolio of evidence could be produced to assess this unit. All learning outcomes offer the opportunity to provide examples from the workplace. Evidence may relate generally to travel and tourism organisations or to a specific travel and tourism organisation.

Most of the evidence is likely to be in a written format, but where evidence is produced from workplace activities, presentations or discussions, witness statements or observation sheets must be used, clearly indicating how specific criteria have been met.

Assessment criteria 1.1, 1.2, 1.3, 1.4

Evidence for 1.1, 1.2 and 1.3 could be in written format as a training booklet or a presentation as part of a training session for newly promoted supervisors.

To achieve 1.1, learners must describe the role of the supervisor in leading by example when delivering excellent customer service. The description does not have to be in-depth, but should incorporate all items in the unit content to demonstrate how supervisors can be effective role models when developing a customer service culture within their organisation.

To achieve 1.2, learners must briefly explain the impact of customer service on the performance of the business. Learners must refer to all items in the unit content and provide examples from the workplace or other travel and tourism contexts.

To achieve 1.3, learners must explain the relationship between delivering customer service and selling services. The explanation can be in general terms or specific to the place of work, drawing on relevant examples. All items in the unit content should be addressed.

To achieve 1.4, learners must identify and apply good practice techniques to monitor the delivery of customer service against organisational standards. Learners should identify different techniques that could be used to monitor customer service delivery against organisational standards including performance indicators, for example to measure repeat business, new customers and customer satisfaction. There is a practical element to 1.4 and learners must also apply at least three techniques to monitor customer service delivery, for example mystery shopper, comment cards, observation or complaints analysis. This could be carried out in the workplace or, by agreement, on work placement.

Assessment criteria 2.1, 2.2, 2.3, 2.4, 2.5, 2.6

Learning outcome 2 focuses on developing and motivating an effective team and the criteria can be combined into a presentation or staff training manual.

To achieve 2.1, learners must analyse how effective teams can be developed to deliver excellent customer service. Evidence could come from the workplace or from a period of work experience where teamwork has been integral to learners' work. Alternatively, evidence could come from research or from experience of excellent customer service from the point of view of being a customer in a travel and tourism business. The analysis should trace the development process following the unit content and including awareness of threats to team development.

To achieve 2.2, learners must explain the importance of staff development in ensuring that excellent customer service is delivered. This should include a brief explanation of the different aspects of staff development listed in the unit content, supported by examples from the workplace where possible.

To achieve 2.3, learners must describe the role of the supervisor in developing teams; all items in the unit content should be addressed.

To achieve 2.4, learners must describe how training and coaching sessions can be implemented to improve the delivery of customer service. Learners should include examples of different types of off-site and on-site group or individual training, coaching and mentoring, and how they can be used to improve customer service.

To achieve 2.5, learners must describe the importance of providing feedback to staff. Both positive and negative feedback should be addressed, showing how it can be used to motivate and focus staff, identify training needs and influence target setting.

To achieve 2.6, learners must apply appropriate methods to deliver feedback to staff. Evidence can be taken from the workplace, or through realistic role-play activities in travel and tourism contexts. Learners should provide examples of giving both formal and informal feedback to staff using four methods: meetings, staff appraisal, staff newsletter and email. Detailed witness statements, observation sheets and/or video evidence should be provided to show how feedback has been given during meetings and staff appraisal.

Assessment criteria 3.1, 3.2, 3.3, 3.4, 3.5

For learning outcome 3, learners must demonstrate that they understand how to effectively monitor and communicate levels of customer service performance. Where possible learners' evidence should be based on a specific organisation, however understanding may also be demonstrated in general terms if supported by pertinent examples.

To achieve 3.1, learners must analyse the importance of developing and implementing clear customer service standards in a travel and tourism business. They should demonstrate their knowledge of customer service standards as outlined in the unit content and how these need to be transparent, implemented by staff and standardised to ensure consistency of service.

To achieve 3.2, learners must describe appropriate ways in which supervisors can monitor and measure the performance of team members. All items in the unit content should be briefly described.

To achieve 3.3, learners must briefly describe appropriate corrective actions that can be taken to resolve failures in the delivery of customer service, including actions listed in the unit content.

To achieve 3.4, learners must explain how performance against customer service standards can be recorded and communicated. All items in the unit content should be identified and briefly explained.

To achieve 3.5, learners must identify ways in which measurement of the effectiveness of customer service can be used to improve future performance. Evidence should include identification of ways of monitoring the operation itself as well as the products and services offered.

Essential resources

Learners should have opportunities to experience practices in the travel and tourism sector first hand. This may be through work placement, employment, visits or interviews with industry spokespersons. IT resources should be provided to allow for research.

Indicative resource materials

Textbooks

Woods A and Hebron L et al – *S/NVQ Level 3 Customer Service: Candidate Handbook* (Heinemann, 2001) ISBN 9780435452278

Journals

Travel Trade Gazette – Reed Business Information

Websites

www.customerservicemanager.com	Customer Service Manager
www.customerservicezone.com	Customer Service Zone
www.people1st.co.uk	People 1st – Sector Skills Council for Hospitality, Leisure, Travel and Tourism

Unit 11: Travel and Tourism Destinations – England

Unit reference number: K/601/3340

Level: 3

Credit value: 5

Guided learning hours: 34

Unit aim

The aim is to develop the learner's knowledge and skills so they can locate important tourist destinations in England and interpret information needed for travel.

Unit introduction

Having a good working knowledge of different destinations is crucial for many job roles in the travel and tourism sector. Whether learners are dealing with leisure customers face to face, organising business travel, or planning and operating holidays, their customers and colleagues will rely on them to source and interpret information on destinations with confidence and accuracy.

This unit focuses on developing learners' knowledge and understanding of travel and tourism destinations in England. They will examine the destination life cycle and how trends impact on destination management. This will enable them to appreciate that destinations do not 'stand still' and that regions, resorts and attractions must respond to trends and changing customer needs.

Learners will explore the different regions of England to identify their main features, locate major cities and towns and investigate how attractions, events, transport routes and physical features play their part in attracting different types of tourists to the largest country in the UK.

On completion of this unit learners will have developed their product knowledge of important tourist destinations in England and their ability to locate and interpret information on a wide range of travel and tourism destinations in England.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the principles affecting product management for destinations in England	1.1 Explain the tourism destination life cycle
	1.2 Explain how trends in tourist visits in England impact on destination management
2 Understand England as a tourist destination	2.1 Explain the area and regional tourism boundaries within England
	2.2 Locate main cities and towns
	2.3 Explain types of tourists main cities and towns attract
	2.4 Describe major tourist attractions
	2.5 Explain types of tourists tourist attractions attract
	2.6 Describe major physical features
	2.7 Locate major transport routes
	2.8 Explain the impact of the transport infrastructure on tourists
	2.9 Describe major events
	2.10 Describe types of tourists that are attracted by major events
	2.11 Explain the benefits and limitations of destinations

Unit content

1 **Understand the principles affecting product management for destinations in England**

Destination management: destinations eg resorts, regions, attractions; stages of the destination life cycle eg Butler; destination management eg planning, marketing, product development, sustainable tourism

2 **Understand England as a tourist destination**

Area and regional tourism boundaries: boundaries (with Wales, Scotland); tourist regions eg South East England, Heart of England, North East; counties eg Kent, North Yorkshire, West Sussex; rural areas eg Cotswolds; urban areas eg Medway Towns; seaside areas eg English Riviera

Cities and towns: eg London, Brighton, Stratford, Durham

Types of tourists: domestic; overseas; purpose of visit eg leisure, business, visiting friends and relatives (VFR), special interest; specific needs eg age, ability; party size eg independent, family, group

Natural and man-made attractions: farms eg Hop Farm, Cruckley Animal Farm; gardens eg Kew Royal Botanic Gardens, Tresco Abbey Gardens; historic houses eg Chatsworth House, Castle Howard; castles eg Dover Castle, Alnwick Castle; historic properties eg Stonehenge, Tower of London; leisure and theme parks eg Alton Towers, Legoland; museums and art galleries eg Tate Modern, National History Museum, Beatles Story; steam/heritage railways eg Settle-Carlisle, Bluebell Railway; visitor and heritage centres eg Wedgwood Visitor Centre, Clifton Suspension Bridge Visitor Centre; wildlife attractions and zoos eg Windsor Safari Park, Chester Zoo; industrial or craft centres eg Cadbury World, Caithness Crystal; places of worship eg York Minster, Canterbury Cathedral; other attractions eg London Eye, Blackpool Tower, Hadrian's Wall

Physical features: eg oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands

Events: eg exhibitions, festivals, sporting events, special interest events or carnivals

Transport routes: land; sea; waterways; air; gateways

Benefits and limitations of destinations: eg in terms of cost, customer needs, accessibility, facilities

Essential guidance for tutors

Delivery

Learners may already have some knowledge of what England can offer its visitors and this unit will focus solely on developing an informed understanding of England as a tourist destination.

Learners are required to be introduced to the concept of the destination life cycle. This may be introduced at an early stage in delivery, using a model such as Butler's. Learners need only have a general understanding of the different stages of the destination life cycle. Rather than examining this in some depth at the outset, it is recommended that this concept is revisited from time to time during the delivery of the unit in the context of specific destinations that are being researched. Learners need to be aware of trends relating to tourist visits and how these can impact on destination management. For example, budget airlines have opened up new routes to England, creating opportunities for regions to attract inbound and domestic visitors to destinations for short breaks. Learners should examine how this has impacted on destination management in terms of the products offered, marketing, infrastructure, facilities etc. Learners should be encouraged to examine visitor trends and statistics while carrying out research into destinations. Tourist board websites can be useful sources of such information.

Determining prior knowledge of England as a tourist destination is a useful starting point for learning outcome 2, and this could be carried out by discussion, quizzes or group activities. Some general research and map work will be beneficial to help learners to recognise the boundaries of England, the different regions and counties, and the rural, urban, coastal areas and towns or cities within them. It is expected that at this level some general knowledge of England's main regions, areas, towns and cities will be retained and therefore short tests can be used to consolidate learning. There are a number of different interpretations of England's 'regions'. Typically the regions are represented in tourism terms as:

North East – counties County Durham, Tyne and Wear, Northumberland

England's North West – counties Cheshire, Cumbria, Lancashire, Merseyside, Manchester

Yorkshire – counties East Yorkshire, North Yorkshire, South Yorkshire, West Yorkshire

East Midlands – counties Derbyshire, Nottinghamshire, Lincolnshire, Leicestershire, Rutland, Northamptonshire

Heart of England – counties Herefordshire, Warwickshire, Staffordshire, Shropshire, West Midlands, Worcestershire

East of England – counties Norfolk, Suffolk, Essex, Cambridgeshire, Hertfordshire, Bedfordshire

London – Greater London, City of London

South West – counties Cornwall, Devon, Somerset, Bristol, Gloucestershire, Wiltshire, Dorset

South East – counties Oxfordshire, Buckinghamshire, Berkshire, Hampshire, Surrey, Kent, East Sussex, West Sussex, Isle of Wight

Source: www.england.com

Learners should be made aware of other 'regions' within England, often named after famous inhabitants of the area, for example Brontë Country, Robin Hood Country and Shakespeare Country.

Learners need to be proficient in selecting and using a wide range of information sources. Practical activities should be devised to ensure learners are skilled and independent in using atlases, brochures, leaflets, guide books and websites to locate and interpret information on destinations in England. Tourist board DVDs and TV travel programmes can be used to help learners 'see' the differences between tourist destinations in England and to understand how they might appeal to different types of visitors. Websites are becoming increasingly well developed and are very useful for class-based research.

Before examining what specific destinations and attractions have to offer it would be useful to consider the needs of different types of tourists when they travel to England. Mind mapping would be a useful way to record ideas and to consider the needs of different types of tourists, including domestic and inbound visitors, and taking into account how these needs may vary depending on the purpose of their visit, for example leisure, business, VFR and special interest. Consideration should be given to visitors with specific needs due to mobility restrictions or disability, and also those of differing age groups. Party size should be considered, for example the needs of those travelling independently, as a family or as a group. Activities should incorporate different elements from the unit range, including the needs of visitors in terms of attractions, events, physical features and transport routes.

Holiday brochures from England specialists, tourist board websites and guidebooks can be used to examine regions and destinations in more depth and to identify what they have to offer visitors in terms of cities and towns, attractions, physical features, events, gateways and transport. Visits would be excellent to embed knowledge gained first-hand, but are not always a practical option for delivery. Picture quizzes can be devised to enable learners to match pictures of major attractions to the correct destinations. Google Earth could be used to support delivery and to add a visual dimension.

Building up a portfolio on England could be a suitable way of storing information for future use in the workplace or for assessment purposes. This could be completed in a structured way if desired, to complement portfolios developed for other units such as *Travel and Tourism Destinations – Scotland, Ireland* and *Wales* (Units 12, 13 and 14 in this specification). Regional files could be developed to incorporate key towns and cities, coastal, rural and urban areas, attractions, physical features, events, gateways and transport. It is essential that the full range of attractions within England is examined during the delivery of the unit. Presentation skills could be developed by learners making short presentations to brief their colleagues on different destinations or attractions and also to explain the limitations of particular areas, for example some may not be easily accessible or may be prohibitively expensive.

To further develop skills for the workplace, practical tasks could be devised in the form of pen portraits and role plays where learners can respond to enquiries from different customers, for example a family looking for an active beach holiday, an elderly couple looking for a gastronomic or cultural short break, or a group looking for a fun weekend stag or hen party. At this level learners should be able to

project a professional image when dealing with such enquiries and they should be able to present the features, benefits and limitations of destinations in terms of cost, customer needs, accessibility and facilities. This will involve efficient and accurate use of resources and the ability to use data to make informed recommendations.

Assessment

It is likely that evidence for this unit will be provided in the form of written evidence, presentations and role plays.

It is suggested that 1.1 and 1.2 are assessed last as learners will have researched a number of destinations in England and will better be able to appreciate links to the tourism destination life cycle and the impact of trends on destination management. Evidence for 1.1 and 1.2 could be produced as a short report or presentation to a group of colleagues.

For 1.1 learners need to explain the tourism destination life cycle. This can be in general terms to demonstrate an understanding of the different stages involved. A diagram, for example Butler's Destination Life Cycle can be used, supported by a simple written explanation of the different stages. Learners should attempt to provide at least one example of a destination within England at each of the life cycle stages.

For 1.2 learners must explain how trends of tourist visits impact on destination management. They should provide three examples of destination management initiatives that have been introduced in response to changing trends in tourist visits in specified destinations in England. This might include new facilities or products to cater for changing markets, improved transport infrastructure, sustainable tourism policies to cope with increased visitor numbers, marketing initiatives to address decline in tourist visits.

To achieve assessment criteria 2.1 to 2.11 learners could be asked to prepare a destination portfolio for England, designed to be used for training members of staff in a travel agency. This evidence could be gathered on an ongoing basis throughout the delivery period. The portfolio could be paper-based or in an electronic format, or produced partially as a series of display boards or handouts. Alternatively learners may be observed in the workplace or role-play situations for some of the evidence. Evidence provided in this way must be substantiated by detailed observation records stating clearly how the learner has met the requirements of specific criteria. Practical activities should be supported by copies of web pages, presentation slides, notes etc and all sources of information should be clearly acknowledged.

For 2.1 learners must explain the area and regional tourism boundaries within England. A coded map could be produced to identify boundaries, counties and regions, together with examples of rural, urban and seaside areas. A short explanatory commentary should support the map and it would be good practice for learners to briefly explain the key features of each of the regions.

For 2.2 learners should demonstrate that they are able to use an atlas effectively to accurately locate at least fifteen major tourist cities or towns in England, including at least one in each of the regions listed in the delivery section. The towns or cities located should be of significance in terms of tourism in England and should include different types of destinations, for example, seaside resorts, cities, spas, country towns.

For 2.3 learners should select three major tourist cities or towns. They should briefly explain what types of tourists would be attracted to each destination and how the destination would attract them. It is not essential for all types of tourists to be addressed for each destination; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the three destinations as a whole. It is suggested that 2.11 could be assessed as an extension to 2.3 (see below).

2.4 and 2.5 can be addressed together. Learners should identify and briefly describe one attraction from each of the types listed in the unit content (farms; gardens; historic houses; castles; historic properties; leisure and theme parks; museums and art galleries; steam/heritage railways; visitor and heritage centres; wildlife attractions and zoos; industrial or craft centres; places of worship; other attractions). This should include at least one attraction in each of the regions listed in the delivery section. For 2.5 they must explain which types of tourists these attractions would attract. It is not sufficient, for example, to say that families, couples and inbound tourists would be attracted to Alnwick Castle; they would have to explain briefly how it would appeal to them.

For 2.6 learners should identify and briefly describe at least two physical features of each region, making sure that all features in the unit content have been addressed across the entirety of the evidence (oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands).

For 2.7 learners should locate major transport routes in England. This should include major land (road, rail), sea, waterways and gateways. A map or series of maps could be produced for this purpose. This could be developed for 2.8 when learners should explain how the transport infrastructure impacts on tourists. It is expected that both positive and negative impacts might be highlighted.

For 2.9, learners should describe five major events in England. Different events could include festivals, exhibitions, sporting events, carnivals and special interest events. For 2.10, they must describe the types of tourists that would be attracted to these events. It is not essential for all types of tourists to be addressed for each event; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the five events as a whole.

For 2.11 learners must explain the benefits and limitations of destinations. This will require learners to make some judgement on the strengths and weaknesses of destinations and it is recommended that this is completed as an extension to 2.3.

Essential resources

Learners should have access to atlases, holiday brochures, guide books and the internet.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006)
ISBN 9781902221939

Boniface B and Cooper C – *Worldwide Destinations: Geography of Travel and Tourism* (Butterworth-Heinemann, 2004) ISBN 9780750659970

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

There are many websites providing detailed information about England and its attractions. Some examples include:

earth.google.com	Google Earth
www.culture.gov.uk	DCMS
www.eastmidlandstourism.co.uk	East Midlands tourism
www.english-heritage.org.uk	English Heritage
www.enjoyengland.com	Enjoy England
www.nationaltrust.org.uk	The National Trust
www.starUK.org.uk	Star UK – statistics on tourism research
www.theukexperience.com	UK Experience (UK holiday brochures)
www.tourismtrade.org.uk	Inbound tourism profiles
www.visitbritain.co.uk	VisitBritain
www.visiteastofengland.com	East of England tourism
www.visitenglandsnorthwest.com	England's North West tourism
www.visitlondon.com	London tourism
www.visitnortheastengland.com	North East England Tourism
www.visitsoutheastengland.com	South East England tourism
www.visitsouthwest.co.uk	South West tourism
www.visittheheart.co.uk	Heart of England tourism
www.yorkshire.com	Yorkshire tourism

Unit 12: Travel and Tourism Destinations – Scotland

Unit reference number: M/601/3341

Level: 3

Credit value: 4

Guided learning hours: 30

Unit aim

The aim is to develop the learner's knowledge and skills so they can locate important tourist destinations in Scotland and interpret information needed for travel.

Unit introduction

Having a good working knowledge of different destinations is crucial for many job roles in the travel and tourism sector. Whether learners are dealing with leisure customers face to face, organising business travel, or planning and operating holidays, their customers and colleagues will rely on them to source and interpret information on destinations with confidence and accuracy.

This unit focuses on developing learners' knowledge and understanding of travel and tourism destinations in Scotland. They will examine the destination life cycle and how trends impact on destination management. This will enable them to appreciate that destinations do not 'stand still' and that regions, resorts and attractions must respond to trends and changing customer needs.

Learners will explore the different regions of Scotland to identify their main features, locate major cities and towns and investigate how attractions, events, transport routes and physical features play their part in attracting different types of tourists to the northernmost country in the UK.

On completion of this unit learners will have developed their product knowledge of important tourist destinations in Scotland and their ability to locate and interpret information on a wide range of travel and tourism destinations in Scotland.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the principles affecting product management for destinations in Scotland	1.1	Explain the tourism destination life cycle
	1.2	Explain how trends of tourist visits impact on destination management
2 Understand Scotland as a tourist destination	2.1	Explain the area and regional tourism boundaries within Scotland
	2.2	Locate main cities and towns
	2.3	Explain types of tourists main cities and towns attract
	2.4	Describe major tourist attractions
	2.5	Explain types of tourists tourist attractions attract
	2.6	Describe major physical features
	2.7	Locate major transport routes
	2.8	Explain the impact of the transport infrastructure on tourists
	2.9	Describe major events
	2.10	Describe types of tourists that are attracted by major events
	2.11	Explain the benefits and limitations of destinations

Unit content

1 **Understand the principles affecting product management for destinations in Scotland**

Destination management: destinations eg resorts, regions, attractions; stages of the destination life cycle eg Butler; destination management eg planning, marketing, product development, sustainable tourism

2 **Understand Scotland as a tourist destination**

Area and regional tourism boundaries: boundaries (with England); tourist regions eg Outer Hebrides, Kingdom of Fife, Scottish Borders; rural areas eg Loch Ness and the Great Glen; urban areas eg Greater Glasgow; seaside areas eg Ayrshire Coast

Cities and towns: eg Edinburgh, Glasgow, Inverness, St Andrews

Types of tourists: domestic; overseas; purpose of visit eg leisure, business, visiting friends and relatives (VFR), special interest; specific needs eg age, ability; party size eg independent, family, group

Natural and man-made attractions: farms eg Aberdeenshire Farming Museum, Craig Highland Farm; gardens eg Inverewe Gardens, Royal Botanic Garden; historic houses eg Hill House, Palace of Holyrood House; castles eg Cawdor Castle, Balmoral Castle; historic properties eg Inveraray Jail, National Wallace Monument; leisure and theme parks eg Loudoun Castle theme park, Landmark Forest Adventure Park; museums and art galleries eg National Gallery of Scotland, Our Dynamic Earth; steam/heritage railways eg Fort William to Mallaig Railway, Bo´ness & Kinneil Railway; visitor and heritage centres eg New Lanark World Heritage Site, Bannockburn Heritage Centre; wildlife attractions and zoos eg Cairngorm Reindeer Centre, Blair Drummond Safari and Adventure Park; industrial or craft centres eg Whisky Trail of Speyside, Famous Grouse Experience; places of worship eg Glasgow Cathedral, St Giles' Cathedral; other attractions eg Culloden Moor Battlefield, Jacobite Loch Ness Cruises, Gretna Green Blacksmith's Shop, Royal Yacht Britannia

Physical features: eg oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands

Events: eg exhibitions, festivals, sporting events, special interest events or carnivals

Transport routes: land; sea; waterways; air; gateways

Benefits and limitations of destinations: eg in terms of cost, customer needs, accessibility, facilities

Essential guidance for tutors

Delivery

Learners may already have some knowledge of what Scotland can offer its visitors and this unit will focus solely on developing an informed understanding of Scotland as a tourist destination.

Learners are required to be introduced to the concept of the destination life cycle. This may be introduced at an early stage in delivery, using a model such as Butler's. Learners need only have a general understanding of the different stages of the destination life cycle. Rather than examining this in some depth at the outset, it is recommended that this concept is revisited from time to time during the delivery of the unit in the context of specific destinations that are being researched. Learners need to be aware of trends relating to tourist visits and how these can impact on destination management. For example, budget airlines have opened up new routes to Scotland, creating opportunities for regions to attract inbound and domestic visitors to destinations for short breaks. Learners should examine how this has impacted on destination management in terms of the products offered, marketing, infrastructure, facilities etc. Learners should be encouraged to examine visitor trends and statistics while carrying out research into destinations. Tourist board websites can be useful sources of such information.

Determining prior knowledge of Scotland as a tourist destination is a useful starting point for learning outcome 2, and this could be carried out by discussion, quizzes or group activities. Some general research and map work will be beneficial to help learners to recognise the boundary with England, the different regions and the rural, urban, coastal areas and towns or cities within them. It is expected that at this level some general knowledge of Scotland's main regions, areas, towns and cities will be retained and therefore short tests can be used to consolidate learning. There are a number of different interpretations of Scotland's 'regions', but most typically the regions are represented in tourism terms as:

Shetland

Orkneys

Outer Hebrides

Highlands and Moray

Aberdeen City and Shire

Angus and Dundee

Perthshire

Argyll, the Isles, Loch Lomond, Stirling and the Trossachs

Kingdom of Fife

Edinburgh and the Lothians

Glasgow and the Clyde Valley

Ayrshire and Arran

Dumfries and Galloway

Scottish Borders

Source: www.visitscotland.com/guide/scotland-factfile/scotlands-regions1

Learners need to be proficient in selecting and using a wide range of information sources. Practical activities should be devised to ensure learners are skilled and independent in using atlases, brochures, leaflets, guide books and websites to locate and interpret information on destinations in Scotland. Tourist board DVDs and TV travel programmes can be used to help learners 'see' the differences between tourist destinations in Scotland and to understand how they might appeal to different types of visitors. Websites are becoming increasingly well developed and are very useful for class-based research.

Before examining what specific destinations and attractions have to offer it would be useful to consider the needs of different types of tourists when they travel to Scotland. Mind mapping would be a useful way to record ideas and to consider the needs of different types of tourists, including domestic and inbound visitors, and taking into account how these needs may vary depending on the purpose of their visit, for example leisure, business, VFR and special interest. Consideration should be given to visitors with specific needs due to mobility restrictions or disability, and also those of differing age groups. Party size should be considered, for example the needs of those travelling independently, as a family or as a group. Activities should incorporate different elements from the unit range, including the needs of visitors in terms of attractions, events, physical features and transport routes.

Holiday brochures from Scotland specialists, tourist board websites and guidebooks can be used to examine regions and destinations in more depth and to identify what they have to offer visitors in terms of cities and towns, attractions, physical features, events, gateways and transport. Visits would be excellent to embed knowledge gained first-hand, but are not always a practical option for delivery. Picture quizzes can be devised to enable learners to match pictures of major attractions to the correct destinations. Google Earth could be used to support delivery and to add a visual dimension.

Building up a portfolio on Scotland could be a suitable way of storing information for future use in the workplace or for assessment purposes. This could be completed in a structured way if desired, to complement portfolios developed for other units such as *Travel and Tourism Destinations – England, Ireland* and *Wales* (Units 11, 13 and 14 in this specification). Regional files could be developed to incorporate key towns and cities, coastal, rural and urban areas, attractions, physical features, events, gateways and transport. It is essential that the full range of attractions within Scotland is examined during the delivery of the unit. Presentation skills could be developed by learners making short presentations to brief their colleagues on different destinations or attractions and also to explain the limitations of particular areas, for example some may not be easily accessible or may be prohibitively expensive.

To further develop skills for the workplace, practical tasks could be devised in the form of pen portraits and role plays where learners can respond to enquiries from different customers, for example a family looking for an active beach holiday, an elderly couple looking for a gastronomic or cultural short break, or a group looking for a fun weekend stag or hen party. At this level learners should be able to project a professional image when dealing with such enquiries and they should be able to present the features, benefits and limitations of destinations in terms of cost, customer needs, accessibility and facilities. This will involve efficient and accurate use of resources and the ability to use data to make informed recommendations.

Assessment

It is likely that evidence for this unit will be provided in the form of written evidence, presentations and role play.

It is suggested that 1.1 and 1.2 are assessed last as learners will have researched a number of destinations in Scotland and will better be able to appreciate links to the tourism destination life cycle and the impact of trends on destination management. Evidence for 1.1 and 1.2 could be produced as a short report or presentation to a group of colleagues.

For 1.1 learners need to explain the tourism destination life cycle. This can be in general terms to demonstrate an understanding of the different stages involved. A diagram, for example Butler's Destination Life Cycle, can be used, supported by a simple written explanation of the different stages. Learners should attempt to provide at least one example of a destination within Scotland at each of the life cycle stages.

For 1.2 learners must explain how trends of tourist visits impact on destination management. They should provide three examples of destination management initiatives that have been introduced in response to changing trends in tourist visits in specified destinations in Scotland. This might include new facilities or products to cater for changing markets, improved transport infrastructure, sustainable tourism policies to cope with increased visitor numbers, marketing initiatives to address decline in tourist visits.

To achieve assessment criteria 2.1 to 2.11 learners could be asked to prepare a destination portfolio for Scotland, designed to be used for training members of staff in a travel agency. This evidence could be gathered on an ongoing basis throughout the delivery period. The portfolio could be paper-based or in an electronic format, or produced partially as a series of display boards or handouts. Alternatively learners may be observed in the workplace or role-play situations for some of the evidence. Evidence provided in this way must be substantiated by detailed observation records stating clearly how the learner has met the requirements of specific criteria. Practical activities should be supported by copies of web pages, presentation slides, notes etc and all sources of information should be clearly acknowledged.

For 2.1 learners must explain the area and regional tourism boundaries within Scotland. A coded map could be produced to identify boundaries and regions, together with examples of rural, urban and seaside areas. A short explanatory commentary should support the map and it would be good practice for learners to briefly explain the key features of each of the regions.

For 2.2 learners should demonstrate that they are able to use an atlas effectively to accurately locate at least ten major tourist cities or towns in Scotland, including at least one in each of the regions listed in the delivery section. The towns or cities located should be of significance in terms of tourism in Scotland and should include different types of destinations, for example, seaside resorts, cities, spas, country towns.

For 2.3 learners should select three major tourist cities or towns. They should briefly explain what types of tourists would be attracted to each destination and how the destination would attract them. It is not essential for all types of tourists to be addressed for each destination; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the three destinations as a whole. It is suggested that 2.11 could be assessed as an extension to 2.3 (see below).

2.4 and 2.5 can be addressed together. Learners should identify and briefly describe one attraction from each of the types listed in the unit content (farms; gardens; historic houses; castles; historic properties; leisure and theme parks; museums and art galleries; steam/heritage railways; visitor and heritage centres; wildlife attractions and zoos; industrial or craft centres; places of worship; other attractions). This should include at least one attraction in each of the regions listed in the delivery section. For 2.5 they must explain which types of tourists these attractions would attract. It is not sufficient, for example, to say that families, inbound tourists, older couples and individuals would be attracted to the Bo´ness & Kinneil Railway; they would have to explain briefly how it would appeal to them.

For 2.6 learners should identify and briefly describe at least one physical feature of each of the regions listed in the delivery section, making sure that all features in the unit content have been addressed across the entirety of the evidence (oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands).

For 2.7 learners should locate major transport routes in Scotland. This should include major land (road, rail), sea, waterways and gateways. A map or series of maps could be produced for this purpose. This could be developed for 2.8 when learners should explain how the transport infrastructure impacts on tourists. It is expected that both positive and negative impacts might be highlighted.

For 2.9, learners should describe five major events in Scotland. Different events could include festivals, exhibitions, sporting events, carnivals and special interest events. For 2.10, they must describe the types of tourists that would be attracted to these events. It is not essential for all types of tourists to be addressed for each event; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the five events as a whole.

For 2.11 learners must explain the benefits and limitations of destinations. This will require learners to make some judgement on the strengths and weaknesses of destinations and it is recommended that this is completed as an extension to 2.3.

Essential resources

Learners should have access to atlases, holiday brochures, guide books and the internet.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006)
ISBN 9781902221939

Boniface B and Cooper C – *Worldwide Destinations: Geography of Travel and Tourism* (Butterworth-Heinemann, 2004) ISBN 9780750659970

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

There are many websites providing detailed information about Scotland and its attractions. Some examples include:

earth.google.com	Google Earth
www.aberdeen-grampian.com	Aberdeen tourism
www.angusanddundee.co.uk	Argus and Dundee tourism
www.ayrshire-arran.com	Ayrshire and Arran tourism
www.culture.gov.uk	DCMS
www.edinburgh.org	Edinburgh tourism
www.glasgow.gov.uk	Glasgow tourism
www.nms.ac.uk	National Museums Scotland
www.nts.org.uk	The National Trust for Scotland
www.perthshire.co.uk	Perthshire tourism
www.shetlandtourism.com	Shetlands tourism
www.starUK.org.uk	Star UK – statistics on tourism research
www.visitdumfriesandgalloway.co.uk	Dumfries and Galloway tourism
www.visitfife.com	Kingdom of Fife tourism
www.visithebrides.com	Outer Hebrides tourism
www.visithighlands.com	Highlands tourism
www.visitorkney.com	Orkneys tourism
www.visitscotland.com	Scotland Tourist Board
www.visitscottishborders.com	Scottish Borders tourism
www.visitscottishheartlands.com	Argyll, the Isles, Loch Lomond, Stirling and the Trossachs tourism

Unit 13: Travel and Tourism Destinations – Ireland

Unit reference number: T/601/3342

Level: 3

Credit value: 4

Guided learning hours: 30

Unit aim

The aim of this unit is to develop the learner's knowledge and skills so they can locate important tourist destinations in Eire and Northern Ireland and interpret information needed for travel.

Unit introduction

Having a good working knowledge of different destinations is crucial for many job roles in the travel and tourism sector. Whether learners are dealing with leisure customers face to face, organising business travel, or planning and operating holidays, their customers and colleagues will rely on them to source and interpret information on destinations with confidence and accuracy.

This unit focuses on developing learners' knowledge and understanding of travel and tourism destinations in Northern Ireland and in the Republic of Ireland. They will examine the destination life cycle and how trends impact on destination management. This will enable them to appreciate that regions, resorts and attractions do not 'stand still' and that destinations must respond to trends and changing customer needs.

Learners will explore the different regions of Ireland to identify their main features, locate major cities and towns and investigate how attractions, events, transport routes and physical features play their part in attracting different types of tourists to the 'Emerald Isle'.

On completion of this unit learners will have developed their product knowledge of important tourist destinations in Ireland and their ability to locate and interpret information on a wide range of travel and tourism destinations in Ireland.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the principles affecting product management for destinations in Ireland	1.1	Explain the tourism destination life cycle
	2.1	Explain how trends of tourist visits impact on destination management
2 Understand Ireland as a tourist destination	2.1	Explain the area and regional tourism boundaries within Eire and Northern Ireland
	2.2	Locate main cities and towns
	2.3	Explain types of tourists main cities and towns attract
	2.4	Describe major tourist attractions
	2.5	Explain types of tourists tourist attractions attract
	2.6	Describe major physical features
	2.7	Locate major transport routes
	2.8	Explain the impact of the transport infrastructure on tourists
	2.9	Describe major events
	2.10	Describe types of tourists that are attracted by major events
	2.11	Explain the benefits and limitations of destinations

Unit content

1 **Understand the principles affecting product management for destinations in Ireland**

Destination management: destinations eg resorts, regions, attractions; stages of the destination life cycle eg Butler; destination management eg planning, marketing, product development, sustainable tourism

2 **Understand Ireland as a tourist destination**

Area and regional tourism boundaries: boundaries (Northern Ireland, Republic of Ireland/Eire); tourist regions eg North West, East Coast, Midlands; counties eg Down, Wicklow, Galway; rural areas eg Fermanagh Lakelands; urban areas eg Greater Cork; seaside areas eg Antrim Coast

Cities and towns: eg Dublin, Belfast, Armagh, Cork, Limerick

Types of tourists: domestic; overseas; purpose of visit eg leisure, business, visiting friends and relatives (VFR), special interest; specific needs eg age, ability; party size eg independent, family, group

Natural and man-made attractions: farms eg Watertop Open Farm, Fortfield Farm; gardens eg National Botanic Gardens, Powerscourt Gardens; historic houses eg Muckross House and Gardens, Farmleigh; castles eg Blarney Castle and Stone, Enniskillen; historic properties eg Trinity College (Book of Kells), Craggaunowen — The Living Past; leisure and theme parks eg Enchanted Forest, Bunratty Castle and Folk Park; museums and art galleries eg The National Gallery of Ireland, Ulster Museum; steam/heritage railways eg Whitehead Excursion Station; visitor and heritage centres eg Cliffs of Moher Visitor Experience, Burren Centre; wildlife attractions and zoos eg Dublin Zoo, Fota Wildlife Park; industrial or craft centres eg Guinness Storehouse, House of Waterford Crystal; places of worship eg St Patrick's Cathedral, Holy Cross Abbey; other attractions eg Giant's Causeway, Newgrange, Glendalough

Physical features: eg oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands

Events: eg exhibitions, festivals, sporting events, special interest events or carnivals

Transport routes: land; sea; waterways; air; gateways

Benefits and limitations of destinations: eg in terms of cost, customer needs, accessibility, facilities

Essential guidance for tutors

Delivery

For the purposes of this unit, 'Ireland' has been used as a collective term when referring to the island as a whole, incorporating Northern Ireland and the Republic of Ireland. However learners must have a clear awareness of their status as part of the UK and EU respectively and, although it is not a part of the specification, they should be aware of the implications this will have for inbound travellers to Ireland, particularly in terms of gateways, entry requirements, documentation and currency.

Learners may already have some knowledge of what Ireland can offer its visitors and this unit will focus solely on developing an informed understanding of Ireland as a tourist destination.

Learners are required to be introduced to the concept of the destination life cycle. This may be introduced at an early stage in delivery, using a model such as Butler's. Learners need only have a general understanding of the different stages of the destination life cycle. Rather than examining this in some depth at the outset, it is recommended that this concept is revisited from time to time during the delivery of the unit in the context of specific destinations that are being researched. Learners need to be aware of trends relating to tourist visits and how these can impact on destination management.

For example, budget airlines have opened up new routes to Ireland, creating opportunities for regions to attract inbound and domestic visitors to destinations for short breaks. Learners should examine how this has impacted on destination management in terms of the products offered, marketing, infrastructure, facilities etc. Learners should be encouraged to examine visitor trends and statistics while carrying out research into destinations. Tourist board websites can be useful sources of such information.

Determining prior knowledge of Ireland as a tourist destination is a useful starting point for learning outcome 2, and this could be carried out by discussion, quizzes or group activities. Some general research and map work will be beneficial to help learners to recognise the boundaries of Northern Ireland and the Republic of Ireland, the different regions and counties, and the rural, urban, coastal areas and towns or cities within them. It is expected that at this level some general knowledge of Ireland's main regions, areas, towns and cities will be retained and therefore short tests can be used to consolidate learning. There are a number of different interpretations of Ireland's 'regions'. There are the ancient provinces of Connaught, Leinster, Munster and Ulster, but more typically the regions are represented in tourism terms as:

North West – counties Donegal, Leitrim, Monaghan, Cavan and Sligo

East Coast — counties Louth, Meath, Wicklow, Kildare, Laois, Longford, East Offaly and Westmeath

Shannon – counties Clare, Limerick, West Offaly, North Tipperary

West — counties Galway, Mayo and Roscommon

The South West – counties Kerry and Cork

The South East – counties Carlow, Kilkenny, South Tipperary, Waterford and Wexford

Dublin

Northern Ireland — counties of Antrim, Armagh, Down, Fermanagh, Derry/Londonderry and Tyrone.

Source: Tourism Ireland Corporate website www.tourismireland.com

Learners need to be proficient in selecting and using a wide range of information sources. Practical activities should be devised to ensure learners are skilled and independent in using atlases, brochures, leaflets, guide books and websites to locate and interpret information on destinations in Ireland. Tourist board DVDs and TV travel programmes can be used to help learners 'see' the differences between tourist destinations in Ireland and to understand how they might appeal to different types of visitors. Websites are becoming increasingly well developed and are very useful for class-based research.

Before examining what specific destinations and attractions have to offer it would be useful to consider the needs of different types of tourists when they travel to Ireland. Mind mapping would be a useful way to record ideas and to consider the needs of different types of tourists, including domestic and inbound visitors, and taking into account how these needs may vary depending on the purpose of their visit, for example leisure, business, VFR and special interest. Consideration should be given to visitors with specific needs due to mobility restrictions or disability, and also those of differing age groups. Party size should be considered, for example the needs of those travelling independently, as a family or as a group. Activities should incorporate different elements from the unit range, including the needs of visitors in terms of attractions, events, physical features and transport routes.

Holiday brochures from Ireland specialists, tourist board websites and guidebooks can be used to examine regions and destinations in more depth and to identify what they have to offer visitors in terms of cities and towns, attractions, physical features, events, gateways and transport. Visits would be excellent to embed knowledge gained first-hand, but are not always a practical option for delivery. Picture quizzes can be devised to enable learners to match pictures of major attractions to the correct destinations. Google Earth could be used to support delivery and to add a visual dimension.

Building up a portfolio on Ireland could be a suitable way of storing information for future use in the workplace or for assessment purposes. This could be completed in a structured way if desired, to complement portfolios developed for other units such as *Travel and Tourism Destinations – England, Scotland* and *Wales* (Units 11, 12 and 14 in this specification). Regional files could be developed to incorporate key towns and cities, coastal, rural and urban areas, attractions, physical features, events, gateways and transport. It is essential that the full range of attractions within Ireland is examined during the delivery of the unit. Presentation skills could be developed by learners making short presentations to brief their colleagues on different destinations or attractions and also to explain the limitations of particular areas, for example some may not be easily accessible or may be prohibitively expensive.

To further develop skills for the workplace, practical tasks could be devised in the form of pen portraits and role plays where learners can respond to enquiries from different customers, for example a family looking for an active beach holiday, an elderly couple looking for a gastronomic or cultural short break, or a group looking

for a fun weekend stag or hen party. At this level learners should be able to project a professional image when dealing with such enquiries and they should be able to present the features, benefits and limitations of destinations in terms of cost, customer needs, accessibility and facilities. This will involve efficient and accurate use of resources and the ability to use data to make informed recommendations.

Assessment

It is likely that evidence for this unit will be provided in the form of written evidence, presentations and role plays.

It is suggested that 1.1 and 1.2 are assessed last as learners will have researched a number of destinations in Ireland and will better be able to appreciate links to the tourism destination life cycle and the impact of trends on destination management. Evidence for 1.1 and 1.2 could be produced as a short report or presentation to a group of colleagues.

For 1.1 learners need to explain the tourism destination life cycle. This can be in general terms to demonstrate an understanding of the different stages involved. A diagram, for example Butler's Destination Life Cycle, can be used, supported by a simple written explanation of the different stages. Learners should attempt to provide at least one example of a destination within Ireland at each of the life cycle stages.

For 1.2 learners must explain how trends of tourist visits impact on destination management. They should provide three examples of destination management initiatives that have been introduced in response to changing trends in tourist visits in specified destinations in Ireland. This might include new facilities or products to cater for changing markets, improved transport infrastructure, sustainable tourism policies to cope with increased visitor numbers, marketing initiatives to address decline in tourist visits.

To achieve assessment criteria 2.1 to 2.11 learners could be asked to prepare a destination portfolio for Ireland, designed to be used for training members of staff in a travel agency. This evidence could be gathered on an ongoing basis throughout the delivery period. The portfolio could be paper-based or in an electronic format, or produced partially as a series of display boards or handouts. Alternatively learners may be observed in the workplace or role-play situations for some of the evidence. Evidence provided in this way must be substantiated by detailed observation records stating clearly how the learner has met the requirements of specific criteria. Practical activities should be supported by copies of web pages, presentation slides, notes etc and all sources of information should be clearly acknowledged.

For 2.1 learners must explain the area and regional tourism boundaries within Northern Ireland and the Republic of Ireland. A coded map could be produced to identify boundaries, counties and regions, together with examples of rural, urban and seaside areas. A short explanatory commentary should support the map and it would be good practice for learners to briefly explain the key features of each of the regions.

For 2.2 learners should demonstrate that they are able to use an atlas effectively to accurately locate at least ten major cities or towns in Ireland, including at least one in each of the regions listed in the delivery section. It is acknowledged that many 'major' towns in Ireland are quite small in comparison to those in England, for example, however the towns or cities located should be of significance in terms of tourism in Ireland.

For 2.3 learners should select three major tourist cities or towns, including at least one in Northern Ireland. They should briefly explain what types of tourists would be attracted to each destination and how the destination would attract them. It is not essential for all types of tourists to be addressed for each destination; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the three destinations as a whole. 2.11 could be assessed as an extension to 2.3 (see below).

2.4 and 2.5 can be addressed together. Learners should identify and briefly describe one attraction from each of the types listed in the unit content (farms; gardens; historic houses; castles; historic properties; leisure and theme parks; museums and art galleries; steam/heritage railways; visitor and heritage centres; wildlife attractions and zoos; industrial or craft centres; places of worship; other attractions). This should include at least one attraction in each of the regions listed in the delivery section. For 2.5 they must explain which types of tourists these attractions would attract. It is not sufficient, for example, to say that families and inbound tourists would be attracted to Bunratty Castle and Folk Park; they would have to explain briefly how it would appeal to them.

For 2.6 learners should identify and briefly describe at least two physical features of each region, making sure that all features in the unit content have been addressed across the entirety of the evidence (oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands).

For 2.7 learners should locate major transport routes in Ireland. This should include major land (road, rail), sea, waterways and gateways. A map or series of maps could be produced for this purpose. This could be developed for 2.8 when learners should explain how the transport infrastructure impacts on tourists. It is expected that both positive and negative impacts might be highlighted.

For 2.9, learners should describe five major events in Ireland, including at least one in Northern Ireland. Different events could include festivals, exhibitions, sporting events, carnivals and special interest events. For 2.10, they must describe the types of tourists that would be attracted to these events. It is not essential for all types of tourists to be addressed for each event; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the five events as a whole.

For 2.11 learners must explain the benefits and limitations of destinations. This will require learners to make some judgement on the strengths and weaknesses of destinations and it is recommended that this is completed as an extension to 2.3.

Essential resources

Learners should have access to atlases, holiday brochures, guide books and the internet.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006)
ISBN 9781902221939

Boniface B and Cooper C – *Worldwide Destinations: Geography of Travel and Tourism* (Butterworth-Heinemann, 2004) ISBN 9780750659970

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

There are many websites providing detailed information about Ireland and its attractions. Some examples include:

earth.google.com	Google Earth
www.derrycity.gov.uk	Derry~Londonderry tourism
www.derryvisitor.com	Derry~Londonderry tourism and tourism strategy
www.discoverireland.ie	Republic of Ireland Tourist Board
www.discoverloughneagh.com	Lough Neagh
www.discovernorthernireland.com	Northern Ireland
www.failteireland.ie	Tourism statistics Republic of Ireland
www.fantasy-ireland.com	Tourist attractions
www.farmattractions.net	Farm attractions
www.gotobelfast.com	Belfast tourism
www.heritageisland.com	Heritage attractions
www.ireland.ie	Ireland tourism
www.nitb.com	Northern Ireland Tourist Board
www.nmni.com	National Museums
www.steamtrainsireland.com	Steam trains
www.tourismireland.com	Tourism Ireland corporate website
www.visitdublin.com	Visit Dublin
www.world-guides.com	Destination information

Unit 14: Travel and Tourism Destinations – Wales

Unit reference number: A/601/3343

Level: 3

Credit value: 4

Guided learning hours: 30

Unit aim

The aim is to develop the learner's knowledge and skills so they can locate important tourist destinations in Wales and interpret information needed for travel.

Unit introduction

Having a good working knowledge of different destinations is crucial for many job roles in the travel and tourism sector. Whether learners are dealing with leisure customers face to face, organising business travel, or planning and operating holidays, their customers and colleagues will rely on them to source and interpret information on destinations with confidence and accuracy.

This unit focuses on developing learners' knowledge and understanding of travel and tourism destinations in Wales. They will examine the destination life cycle and how trends impact on destination management. This will enable them to appreciate that destinations do not 'stand still' and that regions, resorts and attractions must respond to trends and changing customer needs.

Learners will explore the different regions of Wales to identify their main features, locate major cities and towns and investigate how attractions, events, transport routes and physical features play their part in attracting different types of tourists to the 'home of the red dragon'.

On completion of this unit learners will have developed their product knowledge of important tourist destinations in Wales and their ability to locate and interpret information on a wide range of travel and tourism destinations in Wales.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the principles affecting product management for destinations in Wales	1.1	Explain the tourism destination life cycle
	1.2	Explain how trends of tourist visits impact on destination management
2 Understand Wales as a tourist destination	2.1	Explain the area and regional tourism boundaries within Wales
	2.2	Locate main cities and towns
	2.3	Explain types of tourists main cities and towns attract
	2.4	Describe major tourist attractions
	2.5	Explain types of tourists tourist attractions attract
	2.6	Describe major physical features
	2.7	Locate major transport routes
	2.8	Explain the impact of the transport infrastructure on tourists
	2.9	Describe major events
	2.10	Describe types of tourists that are attracted by major events
	2.11	Explain the benefits and limitations of destinations

Unit content

1 **Understand the principles affecting product management for destinations in Wales**

Destination management: destinations eg resorts, regions, attractions; stages of the destination life cycle eg Butler; destination management eg planning, marketing, product development, sustainable tourism

2 **Understand Wales as a tourist destination**

Area and regional tourism boundaries: boundaries (with England); tourist regions eg North West, Mid Wales, South East; counties eg Ceredigion, Monmouthshire, Anglesey; rural areas eg Snowdonia, urban areas eg Cardiff urban area; seaside areas eg Glamorgan Heritage Coast

Cities and towns: eg Cardiff, Swansea, Bangor, Aberystwyth

Types of tourists: domestic; overseas; purpose of visit eg leisure, business, visiting friends and relatives (VFR), special interest; specific needs eg age, ability; party size eg independent, family, group

Natural and man-made attractions: farms eg Cantref Adventure Farm, Foel Farm Park; gardens eg Bodnant Garden, National Botanic Garden of Wales; historic houses eg Plas Newydd Country House and Gardens, Tredegar House; castles eg Powis Castle and Gardens, Conwy Castle; historic properties eg Plas yn Rhiw, Portmeirion; leisure and theme parks eg Oakwood Leisure theme park, GreenWood Forest Park; museums and art galleries eg St Fagans National History Museum, National Museum Wales; steam/heritage railways eg Ffestiniog Railway, Vale of Rheidol Railway, Snowdon Mountain Railway; visitor and heritage centres eg Gower Heritage Centre, Rhossili Visitor Centre; wildlife attractions and zoos eg Welsh Mountain Zoo, Anglesey Sea Zoo; industrial or craft centres eg Corris Craft Centre, Llechwedd Slate Caverns; places of worship eg St Davids, St Asaph Cathedral; other attractions eg Millennium Stadium, Llanfairpwllgwyngyll station, Techniquest @ NEWI

Physical features: eg oceans, seas, bays, mountains, mountain ranges, rivers, lakes, falls, national parks, areas of outstanding natural beauty, islands

Events: eg exhibitions, festivals, sporting events, special interest events or carnivals

Transport routes: land; sea; waterways; air; gateways

Benefits and limitations of destinations: eg in terms of cost, customer needs, accessibility, facilities

Essential guidance for tutors

Delivery

Learners may already have some knowledge of what Wales can offer its visitors and this unit will focus solely on developing an informed understanding of Wales as a tourist destination.

Learners are required to be introduced to the concept of the destination life cycle. This may be introduced at an early stage in delivery, using a model such as Butler's. Learners need only have a general understanding of the different stages of the destination life cycle. Rather than examining this in some depth at the outset, it is recommended that this concept is revisited from time to time during the delivery of the unit in the context of specific destinations that are being researched. Learners need to be aware of trends relating to tourist visits and how these can impact on destination management. For example, budget airlines have opened up new routes to Wales, creating opportunities for regions to attract inbound and domestic visitors to destinations for short breaks. Learners should examine how this has impacted on destination management in terms of the products offered, marketing, infrastructure, facilities etc. Learners should be encouraged to examine visitor trends and statistics while carrying out research into destinations. Tourist board websites can be useful sources of such information.

Determining prior knowledge of Wales as a tourist destination is a useful starting point for learning outcome 2, and this could be carried out by discussion, quizzes or group activities. Some general research and map work will be beneficial to help learners to recognise the boundaries of Wales, the different regions and counties, and the rural, urban, coastal areas and towns or cities within them. It is expected that at this level some general knowledge of Wales's main regions, areas, towns and cities will be retained and therefore short tests can be used to consolidate learning. There are a number of different interpretations of Wales's 'regions'. Typically the regions are represented in tourism terms as:

North West – counties of Gwynedd, Anglesey and Conwy

North East – counties of Wrexham, Flintshire, Denbighshire and part of Conwy

Mid Wales – counties of Powys, Ceredigion, southern Gwynedd (Meirionnydd) and parts of Carmarthenshire, Conwy and Denbighshire

South West – county of Pembrokeshire, part of Carmarthenshire

South East – counties of Monmouthshire, Glamorgan, Newport, Torfaen, Blaenau Gwent, Caerphilly, Cardiff, Merthyr Tydfil, Rhondda Cynon Taff, Bridgend, Swansea

Source: www.wales.com and www.new.wales.gov.uk

Learners need to be proficient in selecting and using a wide range of information sources. Practical activities should be devised to ensure learners are skilled and independent in using atlases, brochures, leaflets, guide books and websites to locate and interpret information on destinations in Wales. Tourist board DVDs and TV travel programmes can be used to help learners 'see' the differences between tourist destinations in Wales and to understand how they might appeal to different types of visitors. Websites are becoming increasingly well developed and are very useful for class-based research.

Before examining what specific destinations and attractions have to offer it would be useful to consider the needs of different types of tourists when they travel to Wales. Mind mapping would be a useful way to record ideas and to consider the needs of different types of tourists, including domestic and inbound visitors, and taking into account how these needs may vary depending on the purpose of their visit, for example leisure, business, VFR and special interest. Consideration should be given to visitors with specific needs due to mobility restrictions or disability, and also those of differing age groups. Party size should be considered, for example the needs of those travelling independently, as a family or as a group. Activities should incorporate different elements from the unit range, including the needs of visitors in terms of attractions, events, physical features and transport routes.

Holiday brochures from Wales' specialists, tourist board websites and guidebooks can be used to examine regions and destinations in more depth and to identify what they have to offer visitors in terms of cities and towns, attractions, physical features, events, gateways and transport. Visits would be excellent to embed knowledge gained first-hand, but are not always a practical option for delivery. Picture quizzes can be devised to enable learners to match pictures of major attractions to the correct destinations. Google Earth could be used to support delivery and to add a visual dimension.

Building up a portfolio on Wales could be a suitable way of storing information for future use in the workplace or for assessment purposes. This could be completed in a structured way if desired, to complement portfolios developed for other units such as *Travel and Tourism Destinations – England, Scotland* and *Ireland* (Units 11, 12 and 13 in this specification). Regional files could be developed to incorporate key towns and cities, coastal, rural and urban areas, attractions, physical features, events, gateways and transport. It is essential that the full range of attractions within Wales is examined during the delivery of the unit. Presentation skills could be developed by learners making short presentations to brief their colleagues on different destinations or attractions and also to explain the limitations of particular areas, for example some may not be easily accessible or may be prohibitively expensive.

To further develop skills for the workplace, practical tasks could be devised in the form of pen portraits and role plays where learners can respond to enquiries from different customers, for example a family looking for an active beach holiday, an elderly couple looking for a gastronomic or cultural short break, or a group looking for a fun weekend stag or hen party. At this level learners should be able to project a professional image when dealing with such enquiries and they should be able to present the features, benefits and limitations of destinations in terms of cost, customer needs, accessibility and facilities. This will involve efficient and accurate use of resources and the ability to use data to make informed recommendations.

Assessment

It is likely that evidence for this unit will be provided in the form of written evidence, presentations and role plays.

It is suggested that 1.1 and 1.2 are assessed last as learners will have researched a number of destinations in Wales and will better be able to appreciate links to the tourism destination life cycle and the impact of trends on destination management. Evidence for 1.1 and 1.2 could be produced as a short report or presentation to a group of colleagues.

For 1.1 learners need to explain the tourism destination life cycle. This can be in general terms to demonstrate an understanding of the different stages involved. A diagram, for example Butler's Destination Life Cycle, can be used, supported by a simple written explanation of the different stages. Learners should attempt to provide at least one example of a destination within Wales at each of the life cycle stages.

For 1.2 learners must explain how trends of tourist visits impact on destination management. They should provide three examples of destination management initiatives that have been introduced in response to changing trends in tourist visits in specified destinations in Wales. This might include new facilities or products to cater for changing markets, improved transport infrastructure, sustainable tourism policies to cope with increased visitor numbers, marketing initiatives to address decline in tourist visits.

To achieve assessment criteria 2.1 to 2.11 learners could be asked to prepare a destination portfolio for Wales, designed to be used for training members of staff in a travel agency. This evidence could be gathered on an ongoing basis throughout the delivery period. The portfolio could be paper-based or in an electronic format, or produced partially as a series of display boards or handouts. Alternatively learners may be observed in the workplace or role-play situations for some of the evidence. Evidence provided in this way must be substantiated by detailed observation records stating clearly how the learner has met the requirements of specific criteria. Practical activities should be supported by copies of web pages, presentation slides, notes etc and all sources of information should be clearly acknowledged.

For 2.1 learners must explain the area and regional tourism boundaries within Wales. A coded map could be produced to identify boundaries and regions, together with examples of rural, urban and seaside areas. A short explanatory commentary should support the map and it would be good practice for learners to briefly explain the key features of each of the regions.

For 2.2 learners should demonstrate that they are able to use an atlas effectively to accurately locate at least ten major tourist cities or towns in Wales, including at least one in each of the regions listed in the delivery section. The towns or cities located should be of significance in terms of tourism in Wales and should include different types of destinations, for example, seaside resorts, cities, spas, country towns.

For 2.3 learners should select three major tourist cities or towns. They should briefly explain what types of tourists would be attracted to each destination and how the destination would attract them. It is not essential for all types of tourists to be addressed for each destination; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the three destinations as a whole. It is suggested that 2.11 could be assessed as an extension to 2.3 (see below).

2.4 and 2.5 can be addressed together. Learners should identify and briefly describe one attraction from each of the types listed in the unit content (farms; gardens; historic houses; castles; historic properties; leisure and theme parks; museums and art galleries; steam/heritage railways; visitor and heritage centres; wildlife attractions and zoos; industrial or craft centres; places of worship; other attractions). This should include at least one attraction in each of the regions listed in the delivery section. For 2.5 they must explain which types of tourists these attractions would attract. It is not sufficient, for example, to say that families, inbound tourists, older couples and individuals would be attracted to the

Snowdon Mountain Railway; they would have to explain briefly how it would appeal to them.

For 2.6 learners should identify and briefly describe at least two physical features of each of the regions listed in the delivery section, making sure that all features in the unit content have been addressed across the entirety of the evidence (oceans, seas, bays, mountains, mountain ranges, rivers, lakes/loughs, falls, national parks, areas of outstanding natural beauty, islands).

For 2.7 learners should locate major transport routes in Wales. This should include major land (road, rail), sea, waterways and gateways. A map or series of maps could be produced for this purpose. This could be developed for 2.8 when learners should explain how the transport infrastructure impacts on tourists. It is expected that both positive and negative impacts might be highlighted.

For 2.9, learners should describe five major events in Wales. Different events could include festivals, exhibitions, sporting events, carnivals and special interest events. For 2.10, they must describe the types of tourists that would be attracted to these events. It is not essential for all types of tourists to be addressed for each event; it is sufficient for learners to consider domestic and overseas, purpose of visit, party size and visitors with specific needs (eg age or disability) across the five events as a whole.

For 2.11 learners must explain the benefits and limitations of destinations. This will require learners to make some judgement on the strengths and weaknesses of destinations and it is recommended that this is completed as an extension to 2.3.

Essential resources

Learners should have access to atlases, holiday brochures, guide books and the internet.

Indicative resource materials

Textbooks

BTEC First Travel Atlas (Columbus, 2006) ISBN 9781846900051

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006)
ISBN 9781902221939

Boniface B and Cooper C – *Worldwide Destinations: Geography of Travel and Tourism* (Butterworth-Heinemann, 2004) ISBN 9780750659970

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

There are many websites providing detailed information about Wales and its attractions. Some examples include:

earth.google.com	Google Earth
www.culture.gov.uk	DCMS
www.greatlittletrainsofwales.co.uk	Great little trains of Wales
www.nationaltrust.org.uk	The National Trust
www.nwt.co.uk	North Wales tourism
www.starUK.org.uk	Star UK – statistics on tourism research
www.tourismtrade.org.uk	Inbound tourism profiles
www.visitanglesey.co.uk	Anglesey tourism
www.visitcardiff.com	Cardiff tourism
www.visitmidwales.co.uk	Mid Wales tourism
www.visitpembrokeshire.com	Pembrokeshire tourism
www.visitsnowdonia.info	Snowdonia tourism
www.visitsouthwales.com	South Wales tourism
www.visitwales.co.uk	Wales Tourist Board

Unit 15:   Air Fares and Ticketing

Unit reference number: D/601/3383

Level: 3

Credit value: 10

Guided learning hours: 70

Unit aim

The aim of this unit is to provide the candidate with the skills required to complete fare constructions for complex routings.

Unit introduction

Air transport is one of the most dynamic industries in the world. The International Air Transport Association (IATA) is its global trade organisation. Part of their role is to set standards and guidelines on air fare construction and the issuing of air travel documentation. Many components of the travel and tourism sector are involved in dealing with airlines, providing information, quoting fares and issuing tickets. Understanding and gaining knowledge of these global standards will provide prospective employees with a skill valued by industry.

This is a collaborative unit that enables learners to develop their skills in order to construct fares in linear/automated format for more complex journeys, including: mileage over 25M; special fares with stopovers; normal fares with add-ons; mixed class sectors; multi-sector differentials; surface sector (open jaw); one way and return journeys with higher intermediate points (HIPs), checking for higher intermediate fares (HIFs) and processing one way backhaul (OWB) checks, circle trip minimum fare (CTM) checks. Learners will develop their skills to interpret and apply appropriate standard and specific rules for all the above fare constructions in linear/automated format. Learners will develop their skills sufficiently to ensure accuracy and adherence to specific rules when constructing fares to the standard required to meet industry regulations as set by the International Air Transport Association (IATA). These skills are useful not only for those employed within business travel agencies and airline reservations, but also in other parts of the travel and tourism sector, such as retail agents and tour operators. Throughout the unit learners will develop their knowledge and understanding of air fare terms and definitions.

While this unit provides the skills and understanding of IATA procedures, a further external examination is required in order to gain the internationally recognised IATA qualification.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Understand air fare terms and definitions	1.1	Interpret and apply IATA fare rules and restrictions
2	Be able to construct fares for journeys that include more than one class	2.1	Construct mixed class fares for single sector differentials in linear/automated format
		2.2	Construct mixed class fares for multi-sector differentials in linear/automated format
3	Be able to construct fares for journeys that are via a city which has a higher fare	3.1	Construct fares for higher intermediate points in linear/automated format
4	Be able to construct fares for journeys that include visiting the same city more than once	4.1	Construct fares that involve limitation of indirect travel in linear/automated format
5	Be able to construct special fares using the mileage system	5.1	Construct special fares using the mileage systems and apply appropriate restrictions in linear/automated format
6	Be able to calculate backhaul and circle trip minimum checks	6.1	Calculate and apply (if appropriate) a backhaul check as a minimum fare construction check for a one way fare
		6.2	Calculate and apply (if appropriate) a circle trip as a minimum fare construction check for a return fare
7	Be able to construct fares using various breakpoints	7.1	Construct fares over 25M in both linear/automated format

Unit content

1 **Understand air fare terms and definitions**

Application of IATA fare rules and restrictions for: mixed class; higher intermediate points; limitations in indirect travel; special fares using mileage system; over 25M; higher intermediate points; single sector differentials; multi-sector differentials; surface sectors; open jaw; stopovers charges; add-on fares; higher intermediate fares; minimum fare check (one-way sub-journey check – OSC); plus up; one-way backhaul checks; circle trip minimum checks

2 **Be able to construct fares for journeys that include more than one class**

Mixed class fares: construct fares for single sector differentials in linear/automated format; construct fares for multi-sector differentials in linear/automated format

3 **Be able to construct fares for journeys that are via a city which has a higher fare**

Higher intermediate points (HIPs): construct fares in linear/automated format for one way and returns that include one or more higher intermediate fares (HIFs) using HIF checks

Add on fares: for one way and/or return normal fare itineraries where add-on fares have to be applied either at original or destination or both; apply rules and restrictions

Surface sectors (open jaw): within one way and/or return normal fares and/or within special fares as applicable; apply rules and restrictions

4 **Be able to construct fares for journeys that include visiting the same city more than once**

Journeys including limitation of indirect routing (side-trips): construct fares in linear automated format for journeys that include more than one departure at origin, and/or more than one arrival at destination and/or more than one stopover at any intermediate point using a OSC where applicable

5 **Be able to construct special fares using the mileage system**

Special fares using mileage: construct special fares within 25M mileage; apply rules and restrictions

Special fares with stopover charges: apply stopovers charges on a return special fare itinerary

6 **Be able to calculate backhaul and circle trip minimum checks**

One way backhaul check rule (OWB or BHC): construct fares for one way journeys with one or more higher intermediate points where the higher intermediate fare check (HIP) results in a HIP from the point of origin resulting in the application of the one way backhaul check rule (OWB or BHC)

Circle trip minimum fare check rule: construct fares for return journeys with one or more higher intermediate points where the higher intermediate fare check (HIP) results in a HIF from the point of origin resulting in the application of the circle trip minimum fare check rule (CTM)

7 **Be able to construct fares using various breakpoints**

Journeys including over 25M surcharges: construct fares in NUCs for one way and return journeys using the principles of the mileage system including where ticketed point mileage (TPM) exceeds maximum permitted mileage (MPM) by over 25 per cent and the 25M surcharge has to be applied; construct fares in linear/automated format

Essential guidance for tutors

Delivery

This unit allows learners to develop the practical skills and knowledge needed to meet the international standards in air fares and ticketing at Level 2 set by IATA. It is essential that learners have already achieved an IATA Air Fares and Ticketing Level 1 qualification and/or R/601/5423, the BTEC *Air Fares and Ticketing* unit which is mapped to IATA Level 1 (Unit 7 in this specification).

It is recommended that delivery should be in small blocks of learning, building towards achievement of the assessment criteria. Tutors must appreciate that this subject can be difficult to grasp and delivery should take into consideration that some learners will progress more slowly than others; the more able learners will probably be ready for assessment earlier than others who will need more time. It is beneficial for the slower learners to be given extra tuition towards the end of the course to ensure that they are capable of achieving all the learning outcomes.

Assessment should be designed to use the Air Tariff, undertaking exercises to accurately construct fares in linear/automated format for a variety of itineraries to include: over 25M surcharge; stopover charges; add-on fares; mixed class fares; multi-sector differentials; surface sector (open jaw); HIPs; HIFs; OWB/BHC; CTM; limitation of indirect routing and using linear format.

Journeys should include a variety of major gateway airports, a number of stopovers, transfers and higher intermediate points and fares. Some HIPs should be from the point of origin and some journeys should include side trips at origin, destination and intermediate points to provide opportunities for complex fare construction. Journeys should provide opportunities to convert NUCs into a range of other worldwide currencies. Journeys could be provided to enable the use of four coupon and conjunction tickets, although tickets are not required for assessment but can be combined within assessment if tutors feel this is appropriate.

It is recommended that tutors use learner manuals and exercises, either purchasing these from a variety of IATA awarding bodies, or tutors may write their own. The manuals/exercises will enable learners to work at their pace and practise outside taught lesson time. There are certain aspects of the unit that some learners may find difficult to grasp and these are:

- add-ons and differentials
- one way backhaul checks
- circle trip minimum check.

Tutors should ensure that learners have grasped these concepts before moving to the next section of the course and before being assessed.

There are opportunities to integrate the teaching of some of the outcomes. For example, add-ons and surface sectors can be taught alongside HIPs and HIFs and differentials. Assessment of fare constructions that include the application of add-ons and surface sectors can be combined with other fare constructions, such as OWB.

It is beneficial to learners if some of the exercises are undertaken in a simulated situation, either using the telephone or face-to-face with customers or communicating information via email. In this way the learner will be able to develop their customer service skills as well as demonstrating efficiency, accuracy and speed to reflect the needs of the industry.

Tutors should have a sound knowledge of this subject and be qualified up to IATA Air Fares and Ticketing Level 2.

This unit has common content and focus with the IATA Level 2 Air Fares and Ticketing qualification. Achievement of the unit should provide learners with the required knowledge to enable them to progress towards achievement of one of the IATA approved examinations (see *Essential resources*).

Assessment

In this unit the order in which the learning outcomes and assessment criteria have been provided can be changed in both delivery and assessment if tutors want to work in accordance with particular training manuals or to meet the study needs of their learners.

Assessment for this unit will involve learners completing a series of practical and written exercises to produce a portfolio of evidence that demonstrates their ability across the assessment criteria. Written exercises are available within air fares and ticketing training manuals and as these are issued for candidates sitting the official IATA Level 2 examination, they will provide evidence to cover all areas of the content. Using only these written exercises, however, will limit learners' experience of communicating face to face with customers and conforming to customer service industry standards. Tutors should note that all assessment evidence provided for this unit must be cross-referenced to the assessment criteria. It is not acceptable for learners to simply present IATA certificates or workbooks in place of clearly labelled assessment evidence. As this unit does not include a time-based externally set assessment, it is essential that learners are assessed on all content listed unless it is an 'eg'. The assessment of this unit is not as demanding as the IATA Level 2 examination so some minor inaccuracies may be tolerated.

Learners will need to construct fares for normal and special one way and return journeys involving the interpretation and application of rules and the application of mileage surcharge. Learners will need to quote fares using neutral units of construction. Learners will also need to demonstrate that they have an understanding of global indicators. All the above will have been covered in the *Air Fares and Ticketing* unit in the Level 2 Technical Certificate (Unit 7 in this specification) and this knowledge forms the basis for the more complex air fares and ticketing concepts within this Level 3 Technical Certificate.

When designing the assessment programme it is recommended that 1.1 should be assessed throughout the programme of study and achievement confirmed at the end; 2.1–7.1 can be achieved individually and in any order as required. Centres should design their assessment strategies to meet a range of individual needs and the local work environment.

It is not recommended that this unit is assessed through one piece of work as if in an examination. It is recommended that the unit is split into smaller parts, allowing achievement to be ongoing, through a series of exercises covering all the essential content. If learners are intending to take the IATA Level 2 Air Fares and Ticketing external examination, it is recommended that learners undertake at least two timed examinations, both covering all the essential content in order to reflect the pressures and speed required by the industry and the IATA examination.

Tutors should ensure that learners are aware that passing this unit does not constitute being qualified to IATA standard, and that learners should seek separate certification for this if required.

Assessment criterion 1.1

Learners will automatically achieve 1.1 while achieving all other criteria (2.1–7.1) and this criterion can be assessed at the end of the programme of study though the evidence submitted for 2.1–7.1.

Assessment criteria 2.1—2.2

To achieve 2.1, learners will need to show they can construct normal mixed class fares for single sector differentials, such as first and business class, in linear/automated format. To achieve 2.2, learners will need to show they can construct normal mixed class fares for multi-sector differentials in linear/automated format.

Assessment criteria 3.1, 6.1, 6.2

To achieve 3.1, learners will need to show that they can construct fares in linear/automated format for journeys with higher intermediate points (HIPs) interpreting and applying appropriate standard and specific rules. This should include the use of add-on fares for one way and return normal fare journeys where a one way or a return fare is unavailable in the Air Tariff. Add-on fares may have to be used at either original or destination or at both.

To achieve 6.1 and 6.2, learners will demonstrate that they can correctly complete a higher intermediate fare check (HIF) from point of origin for one way journeys and in the direction of travel for return journeys. When a HIF has been identified from the point of origin for a one way journey, learners must show that they understand and can apply the one way backhaul check rule (BHC/OWB) and in doing so achieve 6.1. When a HIF has been identified from the point of origin for a return journey, learners must show that they understand and can apply the circle trip minimum fare check rule (CTM) and in doing so achieve 6.2. *Please note that some manuals abbreviate the one way backhaul check using BHC and some using OWB.*

Assessment criterion 4.1

To achieve 4.1, learners will need to show they can construct fares for journeys including limitation of indirect routing (side-trips). They need to identify when there is more than one departure at origin, and/or more than one arrival at destination and/or more than one stopover at any intermediate point and apply the rules for side-trips.

Assessment criterion 5.1

To achieve 5.1, learners will need to show they can construct special fares in linear/automated format applying the principles of the mileage system working within 25M. Learners must also demonstrate their ability to apply stopover charges and determine whether surface sectors (open jaw) are permitted.

Assessment criterion 7.1

To achieve 7.1, learners will need to construct fares where ticketed point mileage (TPM) exceeds maximum permitted mileage (MPM) by over 25 per cent and the 25M surcharge has to be applied.

Essential resources

IATA training materials are available from a number of IATA material publishers such as World Air Fares Training and Virgin Atlantic, and will provide learning materials and exercises to achieve the content of the unit. The Passenger Air Tariff Manual, usually available with the training pack and exercises, is essential.

Indicative resource materials

Textbook

Dale G – *Level 3 BTEC National Travel and Tourism Student Book 1* (Edexcel 2010) ISBN 9781846907272

Website

www.iata.org   International Air Transport Association

Unit 16:   Travel Insurance

Unit reference number: M/601/3372

Level: 3

Credit value: 3

Guided learning hours: 20

Unit aim

The aim of this unit is to provide the candidate with a comprehensive knowledge of travel insurance.

Unit introduction

Insurance is essential for all travellers – domestic, EU and worldwide. Travelling abroad exposes people to many risks which are very different from those experienced at home. On a holiday or a business trip the last thing a traveller needs is to be worrying about paying for medical bills, replacement costs of valuables, passports or money. A customer may have a car accident, injure themselves or lose their laptop. Any of these would have a huge impact on their trip but if they have appropriate and sufficient insurance cover this will, at least, minimise the inconvenience caused.

Selling the most appropriate insurance is an essential part of the service offered by both leisure and business travel agents, tour operators and others selling travel products and services. Learners need to develop a thorough and comprehensive knowledge and understanding of travel insurance including the key features of travel insurance, the different types of travel insurance policies and the cover they provide. Learners will need to appreciate the need for specialist cover, such as car insurance for car rental and policies for those who may be participating in extreme sports such as skiing.

It is essential when selling insurance that the traveller is made aware of, and fully understands, the relevance of providing accurate information about any pre-existing events and pre-existing medical conditions that could lead to claims being declined. Travellers must also be asked sufficient questions to ensure that they understand the limitations of the policy in terms of hazardous activities or the duration of the policy purchased.

Learners will demonstrate their understanding by calculating complex premiums for a range of traveller needs for different worldwide locations.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand key features of travel insurance	1.1	Identify the roles of people involved in dealing with travel insurance
	1.2	Identify the role of different insurance bodies
	1.3	Explain the meaning of complex insurance terminology
	1.4	Explain the meaning of different legal and medical travel insurance terms
	1.5	Explain different insurance qualifications available worldwide
2 Understand insurance policies	2.1	Assess the benefits and limitations of different travel insurance policies
	2.2	Describe the categories of a standard travel insurance policy
	2.3	Explain what information is included in the general section of all policies
3 Understand the cover offered by specialist travel insurance	3.1	Compare different types of travel insurance available
	3.2	Explain the cover offered by specialist insurance policies
	3.3	Explain the services provided by travel insurance for a motoring incident abroad
	3.4	Explain insurance terms associated with car hire
4 Understand information required before issuing a travel insurance policy	4.1	Explain how pre-existing events and pre-existing conditions can affect the sale of travel insurance
	4.2	Identify different hazardous activities and which category they fall under
	4.3	Explain reasons why an insurance claim may be declined

Learning outcomes	Assessment criteria
	4.4 Explain which policy an insurance claim should be made on
	4.5 Identify issues relating to the selling of insurance policies
5 Be able to calculate premiums for specialist travel insurance	5.1 Identify worldwide zones when quoting insurance premiums
	5.2 Calculate complex premiums for different types of travel insurance

Unit content

1 **Understand key features of travel insurance**

Roles of those involved: insurance agent, broker, intermediary, claims handler, loss adjuster, underwriter, assessor

The role of insurance bodies: Association of British Insurers (ABI), Financial Services Authority (FSA), The Association of Travel Insurance Intermediaries (ATII), General Insurance Standards Council (GISC), Financial Ombudsman Service (FOS); role eg responsibility, regulation

Terminology: general terms eg insurer, policy, premium, insured, policy-holder, condition, description of cover, summary of cover; complex terms eg indemnity, benefit, limit, limit of cover, exclusion, excess, maximum sum, standard cover, excess free cover, proposal form, cooling off period, hazardous activity, single article limit, cancellation, contribution, curtailment, compensation, repatriation, claim, abandonment clause, fortuitous clause, settlement

Specialist terminology: legal terms (mitigation, subrogation, uberimae fidei, force majeure); medical terms (health warranty, medical screening, pre-existing condition, general health insurance card)

Qualifications: E111 or equivalent, reciprocal agreement countries

2 **Understand insurance policies**

Policies: types eg single trip, multi-trip/annual, family, business, one way, long stay, gap year, groups, backpackers, adventure, winter sports, flight/travel only, UK insurance, day trips, motoring; benefits limitations eg annual policy for frequent travellers, gap year policy for young people staying longer than normal single trip policy; winter sports policy to ensure coverage of expenses associated with ski accidents; limitations eg single trip policies not covering extreme sport

Categories of a standard travel insurance policy: insurance of the person (including medical and personal accident; cancellation and curtailment charges); personal effects (including luggage, personal possessions, passports, tickets and personal money); unforeseen events (including missed departure of the aircraft, delay to the aircraft); liability (including liability to harm, loss or breakage); legal advice and expenses (including compensation for damages); failure of scheduled airline or other carrier; complete passenger protection

General section of all policies: information included (policy number, summary of cover, conditions, definitions, geographical area, claims advice, contact numbers)

3 **Understand the cover offered by specialist travel insurance**

Travel insurance: basic; specialist

Specialist insurance policies: winter sports cover (avalanche closure, piste closure, loss of ski equipment, ski hire, ski pack, snow guarantee); motoring cover (pre-departure protection, roadside assistance, emergency repairs following breakdown, vehicle immobilised, alternative driver, repatriation of vehicle, bail bond, legal advice and expenses, emergency cash advance, location and transfer)

Travel insurance and motoring incidents abroad: services provided eg guarantee hospital bills, return customer to UK, provide assistance with local language, make available medical escorts, return damaged vehicle home, emergency accommodation, financial help

Insurance terms associated with car hire: Collision Damage Waiver (CDW); Personal Accident Insurance (PAI); Theft Protection; Uninsured Motorist Protection (UMP); Supplementary Liability Insurance; Top Up; Extended Protection

4 **Understand information required before issuing a travel insurance policy**

Pre-existing events: redundancy; illness; hospital appointment; jury service

Pre-existing conditions: eg pregnancy, health warranty, medical condition, travelling against the advice of a medical practitioner, condition for which the customer is on a hospital waiting list, condition for which the customer was travelling abroad to obtain medical treatment

Hazardous activities: eg abseiling, bobsleighing, boxing, bungee jumping, canoeing, expeditions, hang gliding, high-diving, hot air ballooning, martial arts, mountaineering, parachuting, paragliding, parascending, polo, pot-holing, rock-climbing, professional sports, scuba-diving, ski-jumping, ski racing, ski acrobatics, white-water rafting, yachting, any type of flying (other than as a fare-paying passenger)

Category of cover for hazardous activities: covered; covered at an additional premium; not covered at all

Reasons for insurance to be declined: eg time limit, appropriate care, non-emergency reasons, events not outlined in the policy

Insurance claims: type of policy (travel, household, car)

Issues related to the selling of policies: when policies can be sold eg before travel; when policies should not be sold eg when information is not accurate, for trips longer than the policy limitations

5 **Be able to calculate premiums for specialist travel insurance**

Worldwide zones: UK, Europe, North America, worldwide

Premiums: calculations eg level of cover, holiday period, destination, different age groups (infants, children, adults, senior citizens), excess waiver

Travel insurance: types eg basic, ski, motoring

Essential guidance for tutors

Delivery

A useful starting point for this unit would be to ask learners how much they know about travel insurance, and then provide them with some real and fictitious case studies of those who have made the mistake of travelling without insurance. These could include:

- a young man in Greece who had a motorbike accident and is now lying paralysed in a Greek hospital, unable to raise the funds required to airlift him home

- two young women on a gap year left stranded in West Africa when all their possessions, including money and passports, were stolen and their insurance had run out of date

- a couple who hired a car without taking out the collision damage waiver (CDW) and are now having to pay a huge bill.

These will stimulate learners to understand more about the needs of travellers and why it is so important to take out insurance for the right length of time, for the correct zone, to cover the activities being undertaken, to cover the age of the traveller, and for the traveller to provide accurate information about pre-existing events and pre-existing medical conditions.

Learners need to read a variety of insurance policies to enable them to understand all the different sections on a standard policy and then sections on a specialist policy such as one covering winter sports. They need to be aware of the higher cost of policies for different parts of the world, such as the USA. Tutors could make this more interesting by providing learners with detailed customer briefs for them to research and compare different insurance policies in terms of what is provided, such as the amount of cover, the terms and conditions eg excess and limitation, and the cost of the policy. Typical briefs could be:

- an elderly couple aged 75 and 81 want to travel to South Africa to visit family. They will be away for three weeks and during this time they will be going on safari

- three young men aged 17, 18 and 22 are travelling to Colorado for a two-week skiing holiday. While there they also want to heli-ski off piste

- a couple in their early fifties have booked a one-week holiday to France. They are travelling by car and want insurance for themselves and the car

- a young couple have booked a two-week holiday to Switzerland by air and want to hire a car at the airport.

Once learners have come to understand all the different types of policies, the cover provided, the limitations of some policies and the information travellers need to provide, they should then be able to calculate premiums.

The same client briefs could be used with further details provided as appropriate, for learners to calculate the cost of the premiums. Learners could undertake these activities under test conditions if this is felt to be beneficial.

Assessment

For those working in the industry, evidence for some of the criteria can be generated in the workplace. For those studying in a classroom environment, evidence can be generated through practical assessment activities.

To achieve 1.1, learners must identify the roles of those involved in dealing with travel insurance as listed in the unit content. Learners should provide a brief statement for each.

To achieve 1.2, learners must identify the role of each of the insurance bodies listed in the unit content. Learners should provide a brief statement for each.

To achieve 1.3, learners must briefly explain the meaning of at least three general terms and seven complex terms as listed in the unit content.

To achieve 1.4, learners must briefly explain the meaning of at least three legal terms and three medical travel insurance terms from those listed in the unit content.

To achieve 2.1, learners must examine and assess the benefits and limitations of at least three different types of travel insurance policies, including one covering winter sports. Evidence could be in table format.

To achieve 2.2, learners must describe the categories of a standard travel insurance policy, covering all items listed in the unit content. Learners could use a table format and/or annotate an actual standard travel insurance policy to support their descriptions. This could be one of the policies examined for 2.1.

To achieve 2.3, learners must identify and explain what information is included in the general section of all policies as listed in the unit content. Learners could annotate an actual standard travel insurance policy to support their explanations. This could be the same policy as for 2.2.

To achieve 3.1, learners must compare at least two different types of travel insurance, including one basic and one specialist. The comparison should include the type of cover offered by both policies. Evidence could be in the format of a table and actual policies could be used to support evidence.

To achieve 3.2, learners must briefly explain the cover offered by one winter sports insurance policy and one motoring insurance policy. The items listed in the unit content should be included within the explanations. Evidence for 3.2 can be linked with 3.1 and 3.3. Evidence can be verbal or written.

To achieve 3.3, learners must provide an explanation of the services provided by travel insurance for a motoring incident abroad. Evidence for 3.3 can be linked to 3.1 and 3.2. Learners could base their evidence on a case study of a typical motoring incident experienced abroad. The case study should cover some of the examples provided in the unit content.

To achieve 3.4, learners must provide a brief explanation of each of the terms associated with car hire as listed in the unit content.

To achieve 4.1, learners must provide an explanation of how all the pre-existing events listed in the unit content can affect the sale of travel insurance, and how at least five of the pre-existing (medical) conditions can affect the sale of travel insurance. Learners could provide real or fictitious examples to support their explanations.

To achieve 4.2, referring to typical insurance policies, learners must identify two hazardous activities usually covered, two hazardous activities not covered and two hazardous activities covered at an additional premium.

To achieve 4.3, learners must provide a brief explanation of why an insurance claim may be declined, covering three of the reasons listed in the unit content.

To achieve 4.4, learners must explain on which policy an insurance claim should be made covering travel, household and car.

To achieve 4.5, learners must identify issues relating to the selling of insurance policies, covering all items listed in the unit content. Tutors could provide learners with mini case studies in order for them to identify the most appropriate policy to sell.

To achieve 5.1, learners must identify at least four worldwide zones when quoting insurance premiums. Tutors could provide learners with mini case studies in order for them to identify the correct zones covering UK, Europe, North America and Worldwide. Evidence can be lined to 5.2.

To achieve 5.2, learners must calculate travel insurance premiums from given information for different holidays, which must cover each of the zones in 5.1. At least three different types of insurance must be calculated including basic, ski and motoring.

Essential resources

Learners should have access the internet and to a variety of policies and insurance-related documentation. For those not working in the industry, access to visiting speakers from travel insurance companies would be beneficial.

Indicative resource materials

Textbooks

This unit is specific to travel insurance and there are very few textbooks that include detailed information on travel insurance. The following textbooks provide an overview:

Holloway C – *The Business of Tourism* (FT Prentice Hall, 2006)
ISBN 9780273701613

Maurer E – internet *for the Retail Travel Industry* (Delmar Learning, 2002)
ISBN 9780766840713

Sharpley R – *The Tourism Business: an Introduction* (Business Education Publishers, 2002) ISBN 9781901888232

Journals

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

Use of websites is essential for this unit and the following are examples of the type of organisations where learners could obtain information:

www.abi.org.uk	Association of British Insurers (ABI)
www.atii.co.uk	The Association of Travel Insurance Intermediaries (ATII)
www.dh.gov.uk/travellers	European Health Insurance (EHI)
www.financial-ombudsman.org.uk	The Financial Ombudsman Service (FOS)
www.fsa.gov.uk	Financial Services Authority (FSA)

Travel insurance comparison websites:

www.comparethemarket.com

www.gocompare.com

www.moneysupermarket.com

Travel insurance companies:

www.aviva.co.uk

www.essentialtravel.co.uk

www.insureandgo.com

www.staysure.co.uk

www.theAA.com

Tour operators that sell insurance:

www.firstchoice.co.uk

www.saga.co.uk

www.thomascook.com

www.thomson.co.uk

Car hire companies that provide rental insurance:

www.avis.co.uk

www.carhire3000.com

www.hertz.co.uk

Specification – Pearson BTEC Level 2 and 3 Certificates in Travel Services
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Unit 17:   Arranging Business Travel

Unit reference number: **A/601/3374**

Level: **3**

Credit value: **10**

Guided learning hours: **86**

Unit aim

The aim of this unit is to provide the learner with the knowledge and skills so that they have an understanding of the business travel industry.

Unit introduction

Arranging travel for business clients requires a comprehensive understanding of the services available as well as the skills necessary to plan itineraries in accordance with client requirements.

Customer profiling is central to effective travel management and learners will develop an understanding of how this benefits corporations, travellers and travel management companies. The business travel sector is highly competitive and suppliers aim to create loyalty by offering promotional schemes. Learners will explore the different types of schemes and understand the importance of using membership numbers accurately.

Arranging business travel for worldwide business travellers includes providing advice on the cultures, climates and time changes that they will experience, as well as identifying business locations of key commercial significance.

Learners will practise planning multi-sector business traveller itineraries in accordance with client requirements and corporate travel policies. Learners will identify when alternative itineraries may be required due to changes in client requirements and will plan alternative arrangements accordingly. As corporations seek to reduce costs, travelling on discounted air fares is commonplace and learners will arrange discounted fares to match travel policies and client requirements. Rail travel and accommodation will be explored and learners will make arrangements as required.

Learners will complete this unit by developing an understanding of the travel services and ancillary support available to business travellers. Throughout this unit learners will develop both the required level of understanding and the practical skills to support them in the role of travel management consultant.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand the use of customer profiling in business travel	1.1	Outline the components of profiles
	1.2	Explain the benefits of maintaining profiles
	1.3	Describe the use of profiles maintained in information systems
2 Understand business travel promotional schemes	2.1	Identify business travel promotional schemes offered by suppliers
	2.2	Explain the benefits of promotional schemes to the supplier, corporate client and to the traveller
	2.3	Explain the importance of using membership numbers correctly
3 Understand considerations for business travel throughout the world	3.1	Identify towns, cities, gateways in areas of key commercial significance
	3.2	Explain the importance of following business etiquette
	3.3	Explain local etiquette for business travellers
	3.4	Explain the impact of time changes in relation to business travellers
	3.5	Describe how to calculate journey times across different time zones given departure and arrival times
4 Be able to plan business travel itineraries	4.1	Plan multi-sector itineraries to meet the main requirements of business travellers within the corporate client's travel policy
	4.2	Plan alternative multi-sector itineraries in accordance with client's instructions
	4.3	Describe the main requirements of business travellers
	4.4	Describe the main components of a multi-sector itinerary
	4.5	Identify when an alternative multi-sector itinerary may be required

Learning outcomes	Assessment criteria
5 Be able to arrange discounted air fares for the business traveller	5.1 Obtain discounted air fares to match clients' requirements within company travel policy
	5.2 Mark up discounted air fares in accordance with travel management policy
	5.3 Identify features of discounted air fares
	5.4 Describe the rules and regulations applicable to discounted air fare tickets
	5.5 Explain the reasons airlines offer scheduled seats at discounted prices
6 Be able to arrange rail travel for the business traveller	6.1 Obtain rail fares to match clients' requirements within the company travel policy
	6.2 Identify journey times between business travel destinations
	6.3 Interpret information from worldwide rail timetables in respect of journeys between business travel destinations
	6.4 Explain the meaning of the terminology associated with UK domestic rail services
	6.5 Explain the refund regulations required by ATOC
7 Be able to arrange accommodation for the business traveller	7.1 Select accommodation to match clients' requirements within the company travel policy
	7.2 Compare rates offered by accommodation suppliers within the same classification
	7.3 Explain types of accommodation rates, their benefits and application
	7.4 Explain the meaning of the terminology associated with accommodation
	7.5 Outline information on accommodation required by business travellers
	7.6 Describe the methods of guaranteeing reserved accommodation

Learning outcomes	Assessment criteria	
	7.7	Describe the methods of payment available to the business traveller for accommodation and the implications of each
8 Understand travel services for the business traveller	8.1	Compare the advantages and disadvantages of pre-booking a vehicle rental
	8.2	Describe the features of different types of vehicle available for rental by the business traveller
	8.3	Describe the optional facilities available to the business traveller when hiring a vehicle
	8.4	Explain the importance of comparing the rates offered by different vehicle rental companies
	8.5	Explain the implications of restrictions and regulations when hiring a vehicle
	8.6	Describe how to calculate the cost of vehicle rental
	8.7	Explain the benefits of optional passenger services to the business traveller
9 Understand ancillary travel support services for the business traveller	9.1	Explain circumstances when UK citizens may hold more than one passport
	9.2	Explain the importance of obtaining the relevant visa for business travellers
	9.3	Explain visa requirements for business travellers departing from the UK
	9.4	Explain the health requirements for business travellers departing from the UK
	9.5	Explain the limitations of reciprocal medical packages offered under EU regulations
	9.6	Describe the advantages and disadvantages of cover offered by different insurance schemes to the business traveller

Learning outcomes	Assessment criteria
	9.7 Explain the benefits of an annual policy for a frequent traveller as opposed to individual journey policies
	9.8 Identify currency restrictions imposed by foreign countries
	9.9 Explain the types of charges levied in respect of foreign exchange transactions
	9.10 Describe the circumstances when commission charges are usually made
	9.11 Identify the methods of payment and refunds available for foreign exchange transactions

Unit content

1 **Understand the use of customer profiling in business travel**

Components of customer profiles: company details; individual business traveller details; travel policy; service level agreements; route deals; authorised travel arrangers/bookers; out-of-hours contact; form of payment (lodge card, corporate credit card, payment arrangements); traveller details; preferred suppliers; loyalty cards; membership numbers; special requests; passport and visa records; next of kin; emergency contact

Benefits of maintaining profiles: to corporate client eg financial tracking and monitoring, personalised service, efficiency of service; to business traveller eg customer satisfaction, convenience; to travel management company eg financial tracking, supports organisation and administration of business, strategic negotiations with suppliers, future planning

Use of profiles: eg monitor travel budgets, monitor levels of clients' business, renegotiate service level agreements; negotiate preferential rates with suppliers

Profiles: corporate/company details; individual business traveller details

2 **Understand business travel promotional schemes**

Promotional schemes offered by suppliers: loyalty schemes; privilege schemes; frequent user programmes; suppliers (airlines, accommodation providers, vehicle rental companies, vehicle carrying companies (rail and sea), UK rail companies); importance of using correct membership numbers

Benefits of promotional schemes: to the supplier; to the corporate client; to the traveller; financial benefits; convenience; priority

3 **Understand considerations for business travel throughout the world**

Towns, cities, gateways in areas of key commercial significance: financial; manufacturing; processing; agricultural; governmental

Business etiquette: importance of following business etiquette; business practices; language; clothing; culture; customs

Time zones: UCT/GMT; international date-line; Eastern Time; Pacific Time

Time changes: clocks put forward (daylight saving) or back; gain time; lose time; international date line; impacts eg sleep patterns disturbed, jet lag, difficulties in adjusting to local times

Calculating journey times: across different time zones; elapsed flying times

4   **Be able to plan business travel itineraries**

Business travel itineraries: check-in details for the original flight; flight numbers; aircraft; departure and arrival times in local time; elapsed flying time; re-confirmation procedures

Main requirements of business travellers: order requested; choice of transport; departure times; alternative routings; accommodation at each destination; car rental rates; advice on surface transport between airport and city; advice on passport, visa and health requirements for the journey

Travel policy: preferred supplier; class of travel

Alternative itineraries: times; dates; convenience

5   **Be able to arrange discounted air fares for the business traveller**

Discounted air fares: airline nett fares; consolidator fares; web fares and 'no frills' carrier fares (excluding published IATA fares)

Rules and regulations: availability; advance booking; routing; minimum stay; amendment; ticket issue; cancellation; refunds

Reasons: load factors; off-season; off-peak; promotions; competition

6   **Be able to arrange rail travel for the business traveller**

Rail timetable information: times; dates of operation; change points; class; fares; meals; accommodation; on-board facilities; station facilities

Timetables: manual; electronic

Terminology: business travel packages (including executive); airport links; inter-station transfers; on-board services; promotional qualifications (such as rail cards, Apex); station lounges

Refund regulations: restrictions; amounts

ATOC: Association of Train Operating Companies

7   **Be able to arrange accommodation for the business traveller**

Accommodation suppliers: eg hotels, apartments, bed and breakfasts, motels/inns and similar

Rates: corporate rate; preferred rate; client negotiated rate; promotional rate; rack rate; 24 hour rate; day delegate rate; group discounts; facilities provision (video players, screens, whiteboard and markers, flipcharts)

Terminology: full board; half board; room only; bed and breakfast

Information: location; rates; classification; number of rooms; types of private facilities; business and conference facilities; commission rates; check-in and check-out times; room release and cancellation policy

Guaranteeing reservations: corporate or personal credit card travel management IATA number; advance payment

Methods of payment: personal credit card; corporate credit card; debit card; cheque; cash

8 **Understand travel services for the business traveller**

Advantages and disadvantages of pre-booking: to the customer; to the travel management consultancy

Types of vehicle: category; capacity; seating; doors; manual; automatic transmission; air conditioning

Facilities: child/infant seats; roof racks; car phones; navigation systems

Rates: corporate; basic; time and mileage; pre-paid; all-inclusive; promotional; one-way

Restrictions and regulations: security deposits; cross border; charges (drop-off, collection, one-way)

Optional passenger services: chauffeur parking; airport parking; meet and greet; private transfers; complimentary limousines; business lounges

9 **Understand ancillary travel support services for the business traveller**

Circumstances: dual nationality; travelling on one passport while second at embassy for visa process; visiting 'sensitive' country

Visa requirements: single entry; multi-entry; transit

Health requirements: compulsory (required); recommended (optional)

Limitations: cover; comparison with UK provision

Advantages and disadvantages: cover; cost; clauses

Insurance schemes: corporate clients' own policy; travel management company policy; private medical insurance; credit/charge/loyalty card schemes

Benefits of annual policy: cost; convenience

Currency restrictions: import; export

Charges: handling fees; transaction fees; commission

Foreign exchange transactions: foreign currency; travellers cheques

Essential guidance for tutors

Delivery

This unit requires learners to develop an understanding of how business travel is arranged and the skills required by travel management consultants. To begin the unit, tutors could lead a discussion and 'wordstorm' on the different types of business traveller and the different types of journeys, methods of transport and accommodation. Learners could assume the identity of different business travellers and complete a traveller profile form in order to appreciate the full range of information held by travel management companies on individual travellers. A basic template for a traveller can be viewed on www.ehow.com.

Due to the withdrawal of commissions by many suppliers, travel management companies have focused on their expertise and play a significant consultancy role in advising corporations on travel practices, suppliers and in feeding back financial information to client corporations. At this stage in the unit it would be helpful for learners to start a glossary of travel management terms. In groups, learners could identify the benefits of maintaining profiles for each party and then present this information to the class. A guest speaker or visit to a travel management company, or alternatively a person responsible for making travel arrangements for employees, would support the delivery of learning outcome 1.

Most suppliers aim to reward loyal customers, and travel management companies should aim to maximise the benefits of promotional schemes for their clients. To appreciate the wide range of supplier promotional schemes, learners could undertake research into the different schemes on offer. A practical way to disseminate this information would be to hold an 'exhibition' where learners can share and discuss their findings and even provide advice to different 'travellers'.

Learners should develop good working knowledge of key business destinations around the world that are of commercial significance. It is recommended that learners build up profiles of destinations that include location, key commercial areas and any specific corporations or organisations with operations located there. A method of delivery for learning outcome 3 would be to hold a 'Working globally' exhibition where learners research and become experts on specific destinations and pass on information to each other. Tutors could check learning by questioning learners on the type of travellers who may travel to specific destinations. At this level learners should be able to confidently locate destinations using atlases and this should be practised throughout the unit. Business travellers must be well prepared when travelling to foreign countries, and having an appreciation and respect for cultural differences can be critical to building and maintaining successful business relationships. This should be an enjoyable topic and there are many opportunities for tutors to promote equality and diversity. Tutors should provide learners with examples of business practices, such as presenting a business card with two hands when in Japan. Discussions of learner experiences of other cultures would also support this outcome.

Understanding time changes and time zones is absolutely crucial to effective business travel planning. Tutors should place great emphasis on understanding flight times in order to make suitable connections and transfer arrangements as well as advising travellers on stopovers. Learners will benefit from plenty of repetition and practice of calculating journey times including elapsed flying times.

The delivery of learning outcome 4 should start with an exploration of traveller requirements and travel policies, as this should inform the planning of itineraries. Tutors will need to provide examples of real or simulated requests from clients as well as accompanying travel policies that need to be adhered to. Learners could initially work in pairs to source and select appropriate travel options and then should become confident at working independently. Learners will need to become familiar with the layout and presentation of multi-sector itineraries and tutors could provide templates. Tutors could also support learners by providing checklists to ensure that all of the relevant components of the itineraries are covered. In a classroom setting it is acceptable for the internet to be the main source for travel information. If possible, an Official Airline Guide (OAG) would be a beneficial training resource as it replicates the format of flight schedules found on Global Distribution Systems and also includes minimum connecting times.

As corporations seek efficiencies and savings, travel expenditure is no exception, and so travel management companies must use their expertise in selecting suitable air fares for their clients. Discounted air fares, economy travel and low-cost airlines are all features of corporate travel and policies are designed to inform travel arrangers of the situations when discounted air fares are to be used. Tutors could start delivery of learning outcome 5 by comparing a full published fare with a discounted fare to the same destination. This could form the basis for a discussion and exploration of the features of discounted air fares and the reasons why airlines offer discounted prices. Tutors will need to provide examples of travel policies that stipulate the situations/destinations when discounted air fares are to be used. For example, a policy may state that for short-haul travel all fares are to be low cost if the schedule is suitable. Some corporations insist that business or first class is only used for long-haul flights exceeding eight hours. Learners will need to develop the ability to source discounted air fares and specifically how to mark up discounted air fares in accordance with the travel management policy in order to remain competitive whilst ensuring profitability. Tutors could demonstrate how to mark up fares and learners could practise this in pairs; tutors must ensure that fares are accurate and that learners understand the importance of accuracy.

Learning outcome 6 requires learners to develop the necessary knowledge to be able to arrange rail travel. As in previous outcomes the corporate travel policy is to be used as the starting point in order to ensure that the client needs are met accurately. Tutors could open this outcome with an overview of UK domestic rail and could set team challenges for learners to source specific rail terminology and information. Learners should be encouraged to create their own glossary of rail terminology to support them in the practical tasks. Tutors will need to source manual timetables for worldwide rail journeys so that learners study and abstract the required information rather than inputting information into a website. Timetables can be downloaded from both the Eurostar and Eurail websites. Tutors should provide relevant client requests and create opportunities for learners to practice obtaining and interpreting information from selected rail timetables. The National Rail website is the journey planning website of ATOC and contains all information in relation to journeys, facilities and terms and conditions.

When arranging suitable accommodation, travellers' requirements must be met in terms of the location, rates and facilities. Learners would benefit from a visit to a local hotel to see the type of facilities offered to business customers, and a guest speaker could enhance delivery by explaining the different rates and terminology.

When arranging accommodation learners must focus on meeting both the client's requirements and demands of the corporate travel policy. As in previous outcomes tutors will need to provide realistic scenarios and accompanying documentation. It is important that learners become confident in using appropriate terminology and they could create glossaries to reinforce this learning.

Vehicle rental provides travellers with the independence and flexibility to travel around destinations as required and may be the most convenient and economical transport option for some clients. Tutors could open the delivery of learning outcome 8 with a discussion of different journey scenarios in which clients have multiple journeys to make within a destination, equipment may need to be moved or business locations may not be easily accessible by alternative transport methods. Learners will need to assume the role of both a customer and a travel management consultant in order to identify and compare the advantages and disadvantages of pre-booking vehicle rental. Tutors will need to provide examples of cancellation policies to support learners in looking at the disadvantages. When learning about the different types of vehicles, learners could work together to produce a vehicle rental brochure and this could include the optional facilities available. Learners will need to become familiar with the different rates offered by suppliers; one classroom task could be to compare different rates for the same vehicles as a basis for discussion. Tutors must emphasise the importance of adhering to restrictions and regulations, and a guest speaker from a vehicle rental supplier would enhance the delivery by explaining the different approaches used to security deposits and customer liability. Learners should practise costing different types of car hire using supplier websites in order to develop the required knowledge prior to assessment.

Optional passenger services provide an additional revenue stream for travel management companies and can add to passenger convenience and enjoyment. Learners will need to examine each of the optional services in detail and be confident in explaining the benefits. Learners could present different services to the class and 'sell' the benefits as if they were making recommendations to business travellers.

Learners will need to develop an understanding of the ancillary travel support services for business travellers. Tutors should explain the various circumstances when more than one passport may be held by a UK citizen and place this in the working context of a travel management consultant. As part of the consultancy role, travel management companies keep records of individual travellers' visa details within the traveller's profile and consultants are responsible for ensuring that relevant visas are obtained and valid for travel as part of the service provided. Learners could research the different types of visas required by UK citizens when departing from the UK to different countries. Travel management companies should advise travellers on the relevant health requirements for travelling outside the UK, and this should include compulsory requirements such as medical certificates and recommended requirements such as vaccinations. Learners can research current information using the internet including the FCO website. Learners will need to become familiar with the EHIC arrangements within Europe, but tutors should focus delivery on the limitations of this provision. Tutors could provide learners with 'FAQs' regarding EHIC. Information on limitations can be found from both the FCO and NHS websites.

Tutors will need to explain different types of insurance schemes and provide learners with examples of policies for learners to examine. Learners could 'consult' each other in role plays as to the advantages and disadvantages of the different schemes and this could include the benefits of annual policies.

Learner will need to identify the import and export restrictions on currency and this should be researched for relevant business destinations around the world. Learners will need to understand the different charges levied in respect of foreign exchange transactions. Learners would benefit from a visit to a bureau de change; this could be a visit organised by the tutor or learners could visit independently to research the information.

Assessment

Tutors will need to design assessments that will adequately assess the required level of understanding and practical abilities required by travel management consultants while meeting the needs of individual learners at the centre. It is recommended in classroom settings that learners are provided with template documents and examples of profiles, policies and itineraries in order for the appropriate context to be created. As this unit aims to prepare learners for the workplace, it is recommended that written assessments could be in the form of training resources that would assist a member of staff in their role as a travel management consultant.

To achieve 1.1, learners must outline all components of profiles and this could include a summary of each relevant section.

To achieve 1.2, the benefits of profiles to each party must be explained and learners could provide specific examples to support their work and cover the range. For example, a response could be: 'Travellers benefit from all of their preferences being held by the travel management company as they do not have to repeat this every time they make a booking. For example, if a traveller flies regularly and prefers a window seat, this request will automatically be entered into the reservation for them and therefore saves them time.'

To achieve 1.3, learners must describe the use of profiles in terms of the ways that the information is used.

2.1—2.3 could be assessed through a booklet given business travellers at a business travel exhibition.

To achieve 2.1, learners must identify current promotional schemes offered by each of the suppliers listed in the unit content.

To achieve 2.2, the benefits of promotional schemes must be explained for the supplier, corporate client and business traveller.

To achieve 2.3, learners must explain the importance of using membership numbers correctly in order to realise the benefits for all parties involved.

3.1—3.5 could be assessed through a variety of written and practical assignments aimed at providing advice to business travellers.

To achieve 3.1, learners must identify a minimum of three of each type of commercial destination. For each destination, learners should identify the relevant gateways, state the location and identify the type of commerce that exists there. Tutors should provide blank maps and learners should be able to independently locate the destinations.

To achieve 3.2, learners must explain the importance of following business etiquette and to achieve 3.3, learners must explain local etiquette. Learners could produce a leaflet for travellers that explains the importance of following business etiquette and gives clear explanations of local etiquette for different business destinations. Evidence could be linked to the destinations covered in 3.1.

To achieve 3.4, learners must explain the impact time changes can have on business travellers.

To achieve 3.5, learners must describe how to calculate journey times across different time zones. Learners should be given several arrival and departure times for journeys across different time zones including from the UK across the Atlantic and Pacific and from the UK across the Eastern hemisphere. At least one journey should cross the International Date Line from East to West and another from West to East. Learners should state the steps they need to take in order to calculate the journey times.

The assessment criteria for learning outcome 4 can be divided into knowledge-based and practical tasks.

To achieve 4.1, learners must plan two multi-sector itineraries in accordance with both traveller requirements and a corporate travel policy. Tutors will need to provide realistic client requests through an appropriate communication method, such as email, as well as the corporate travel policy for each client. Tutors must ensure that client requests cover each of the main requirements listed in the content and the itineraries produced by learners must include all of the components. Itineraries should be produced in a professional business itinerary style.

To achieve 4.2, learners must plan alternative multi-sector itineraries for each itinerary already produced. Tutors must provide learners with realistic requests from clients for alternative arrangements to be made.

Assessment criteria 4.3–4.5 require evidence of the knowledge used to produce the itineraries for 4.1 and 4.2. Learners can provide their descriptions verbally or in written format, while producing evidence for 4.1 and 4.2, as follows:

To achieve 4.3, learners must describe each of the main requirements of business travellers and should link their evidence to 4.1.

To achieve 4.4, learners must describe the main components of a multi-sector itinerary and should link their evidence to 4.1.

To achieve 4.5, learners need to identify when an alternative multi-sector itinerary may be required, and should link their evidence to 4.2.

Tutors will need to provide suitable assessment materials in order for learners to meet the practical assessment criteria 5.1 and 5.2.

For 5.1, tutors will need to provide a relevant company travel policy with clear statements regarding the use of discounted air fares and low-cost airlines. Client requests will also need to be presented to learners and it is recommended that these relate to a two-sector return journey. To achieve 5.1, learners must obtain discounted air fares that match the client requests and adhere to the travel policy.

For 5.2 tutors will need to provide a travel management policy that clearly states the amount of mark-up for each type of discounted fare. To achieve 5.2, learners must mark up each type of fare and clearly show the mark-up process.

To achieve 5.3, learners must identify the features of discounted air fares and should include nett fares, consolidator fares, web fares and low-cost fares and this could be via a short summary of each. This evidence can be produced verbally or written and linked to 5.1.

To achieve 5.4, learners must describe the rules and regulations applicable to discounted air fare tickets and this could be linked to the fares sourced in 5.1 and must cover the full range of content. This evidence can be produced verbally or written and linked to 5.1.

To achieve 5.5, learners must explain the reasons that scheduled airlines offer discounted air fares and this should include each of the reasons provided. There must be clear differentiation between off-season and off-peak as off-peak can relate to the time of day and days of travel. Evidence can be presented verbally or written and linked to 5.1.

Achievement of 6.1, 6.2 and 6.3 can be integrated. Tutors will need to provide relevant documentation in order for learners to meet the practical assessment criteria.

For 6.1 tutors will need to provide a suitable client request for rail travel between business travel destinations and an associated travel policy. To achieve 6.1, learners must obtain the relevant fares to match the client's requirements and adhere to the travel policy.

To achieve 6.2, learners must identify the correct journey times between business travel destinations and this could be assessed through a response to a client enquiry.

For 6.3, tutors will need to provide relevant worldwide rail timetables; one timetable should be manual and another should be online. Tutors should set specific tasks where learners are required to interpret all of the required information provided in the timetables as stated in the content range.

To achieve 6.4, learners must briefly explain the meaning of all of the terminology listed within the content for UK domestic rail services.

To achieve 6.5, learners must explain the refund regulations required by ATOC. These can be sourced from National Rail.

Achievement of assessment criteria 7.1—7.7 can be integrated, with verbal descriptions and explanations provided to support the practical tasks.

For 7.1 tutors must provide a suitable client request for accommodation and an accompanying travel policy. To achieve 7.1, learners must select suitable accommodation to match clients' requirements within the company travel policy.

To achieve 7.2, learners must compare rates offered by accommodation suppliers within the same classification. This could be in response to a client enquiry.

To achieve 7.3, learners must explain at least three different types of rate, their benefits and the ways in which they are applied. Learners could produce a written guide to arranging accommodation that would support them in the practical tasks.

To achieve 7.4, learners must explain the meaning of the terminology associated with accommodation.

To achieve 7.5, learners must summarise the accommodation information required by business travellers. Evidence can be linked to 7.1.

To achieve 7.6, learners must describe each method of guaranteeing accommodation reservations.

To achieve 7.7, learners must describe each of the methods of payment and for each method describe the implications. For example, learners could include the time period in which funds are transferred to the supplier and if the travellers have to make a claim back from their employer. Learners could produce a training resource that would support them in arranging travel services for business travellers.

To achieve 8.1, learners must compare the advantages and disadvantages of pre-booking vehicle rental. Evidence could be produced in a table format.

To achieve 8.2, learners must describe the features of different types of vehicle. This should include a description of the category/classification, fuel capacity, seating, doors, transmission and air conditioning. Learners should describe vehicles from different categories, for example, small, medium and large cars, executive cars, people carriers and vans. Learners could download and annotate published details from car hire websites to support their descriptions.

To achieve 8.3, learners must describe each of the optional facilities listed in the content.

To achieve 8.4, learners must explain the importance of comparing rates offered by different suppliers. This should include reference to the role of travel management consultancy and to retaining customers.

To achieve 8.5, learners must explain the implications of restrictions and regulations, rather than explaining each one.

To achieve 8.6, learners must describe how to calculate the cost of vehicle rental. This could be in the form of an annotated flow chart or screen shot.

To achieve 8.7, learners must explain the benefits of each optional service in terms of how they benefit the business traveller.

For 9.1—9.11 learners could produce a guide to ancillary support services that would support them in their role as a travel management consultant. The guide could be presented in written format or as a presentation.

For 9.1, learners must explain each of the circumstances when UK citizens may hold more than one passport.

To achieve 9.2, learners must explain the importance of obtaining the relevant visa for business travellers. This should relate to the service provided by travel management companies and the implications for the travellers.

To achieve 9.3, learners must explain the visa requirements for UK business travellers departing from the UK and should provide examples of countries that require visas to support their explanation.

To achieve 9.4, learners must explain the health requirements for UK business travellers departing from the UK, in terms of both compulsory and recommended health precautions. This should be linked to relevant countries where there are health requirements.

To achieve 9.5, learners must explain the limitations of the reciprocal medical packages under the EU regulations in relation to the range of cover, and give a comparison with UK provision.

To achieve 9.6, learners must describe the advantages and disadvantages of cover offered by each of the different insurance schemes. This could be presented in a table for each scheme.

To achieve 9.7, learners must explain the benefits of an annual insurance policy in terms of cost and convenience. Learners should make reference to actual policies to support their explanations.

To achieve 9.8, learners must identify currency restrictions imposed by foreign countries where key business destinations are located.

To achieve 9.9, learners must explain each type of charge that can be levied during foreign exchange transactions.

To achieve 9.10, learners must describe the circumstances when commission charges are usually made.

To achieve 9.11, learners must identify the different methods of payment for foreign exchange and also the refunds that are available on unused currency and travellers cheques.

Essential resources

Learners will need access to the following:

- PCs and the internet
- simulated documents: customer requests, itinerary templates, corporate travel policies
- *Official Airline Guide* (OAG)
- rail timetables
- travel insurance policies.

Indicative resource materials

Textbooks

Davidson R, Cope B – *Business Travel: Conferences, Incentive Travel, Exhibitions, Corporate Hospitality and Corporate Travel* (Prentice Hall, 2002)
ISBN 9780582404441

Swarbrooke J, Horner S – *Business Travel and Tourism* (Butterworth-Heinemann, 2001) ISBN 9780750643924

Websites

www.ba.com	British Airways
www.carlsonwagonlit.com	Carlson Wagonlit Travel
www.easyjet.com	Easyjet
www.EHIC.org.uk	European Health Insurance card
www.eurail.com	Eurail
www.europecar.co.uk	Europe Car
www.eurostar.com	Eurostar
www.fco.gov.uk	Foreign & Commonwealth Office
www.flybe.com	Flybe airline
www.gtmc.org	Guild of Travel Management Companies
www.nationalrail.co.uk	National Rail
www.NHS.uk	NHS
www.opodo.co.uk	Opodo

Unit 18: Special Interest Holidays and Independent Travel

Unit reference number: J/601/3328

Level: 3

Credit value: 7

Guided learning hours: 56

Unit aim

The aim of this unit is to provide the candidate with the ability to source and book independent and special interest holidays on behalf of leisure travel customers.

Unit introduction

Leisure tourism has changed since mass market holiday products were introduced in the 1970s. Industries within the travel and tourism sector need to reflect current trends and interests by altering products and services to meet the changing needs and expectations of customers, and remain profitable. Consequently travel and tourism organisations have responded to changing customer needs with the rapid growth of independent and special interest travel options over the last decade.

This unit enables learners to explore differing customer motivations for leisure travel. They will find out about the different types of special interest and independent travel products on offer, examine reasons for people choosing to travel independently and identify the factors that have led to the changes and growth in the special interest travel market. Learners will identify the benefits and limitations of independent travel and the licensing issues affecting it.

Most of the unit is of a practical nature and learners will identify, use and interpret different sources of information to plan and construct itineraries, and calculate the costs of both special interest holidays and independent leisure travel.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand independent and special interest travel customers	1.1	Analyse customers' motivation to travel
	1.2	Define 'independent' travel
	1.3	Define 'special interest' travel
	1.4	Explain reasons why people choose to travel independently
	1.5	Explain factors influencing special interest holidays
	1.6	Explain benefits and limitations to customers of independent travel
	1.7	Explain the role of ATOL in relation to providing independent inclusive tours to customers
2 Be able to plan and construct itineraries for travel and tourism customers	2.1	Plan travel arrangements for travel and tourism customers
	2.2	Construct itineraries for travel and tourism customers
	2.3	Identify sources of information to support the planning of travel arrangements
	2.4	Describe the planning process for special interest and independent travel
	2.5	Identify elements of travel arrangements to meet customer requirements
	2.6	Explain the purpose of an itinerary
	2.7	Explain the importance of constructing a full and accurate itinerary for travellers
	2.8	Explain the consequences of providing customers with inaccurate itineraries

Learning outcomes	Assessment criteria	
3 Be able to calculate the cost of special interest holidays	3.1	Interpret information for customers from a variety of sources
	3.2	Calculate costs of special interest holidays
	3.3	Identify sources of information on special interest holidays
	3.4	Identify components of special interest holiday
	3.5	Explain chargeable extras for special interest holidays
4 Be able to calculate the cost of independent travel	4.1	Interpret information for customers from variety of sources
	4.2	Calculate costs of independent travel
	4.3	Describe elements of independent travel
	4.4	Identify the cost of each element of the itinerary
	4.5	Identify correct charges for extras that may apply to the travel arrangements
	4.6	Describe how to convert costs given in foreign currencies into sterling
	4.7	Explain how travel agents can make a profit from independent travel arrangements
	4.8	Explain booking conditions which may apply to independent travel arrangements

Unit content

1 **Understand independent and special interest travel customers**

Motivation: motivational theories eg Plog

Independent: eg non-pre-packaged travel arrangements, packaged by the travel agent not a tour operator, dynamic packages

Special interest: eg adventure, outdoor pursuits, hobbies and interests, education, spectatorism, weddings, luxury, health spas, cultural, historic

Reasons: eg flexibility, cost, independence, package not available

Factors influencing: eg demographics, lifestyle, individuals, groups, teams, clubs, youth market, grey market

Benefits: eg choice, cost, flexibility

Limitations: eg on tour/in resort support, cost

ATOL: CAA; the Package Tour Regulations

2 **Be able to plan and construct itineraries for travel and tourism customers**

Information: eg electronic, brochures, manuals, specialist operator, tour operator products from those whose main business is mass market

Elements: transportation eg land, sea and air; accommodation (any type); board arrangements; ground arrangements; ancillary products and services; timings; check-in locations

3 **Be able to calculate the cost of special interest holidays**

Sources: eg specialist tour operators, tour operator products from those whose main business is mass market, electronic, brochures, leaflets, manuals

Extras: eg visas, additional wedding charges, additional excursions, upgrades, activity costs, equipment/clothing

4 **Be able to calculate the cost of independent travel**

Sources: eg specialist tour operators, electronic, brochures, leaflets, manuals

Elements: transportation eg land, sea and air; accommodation (any type); ground arrangements; ancillary products and services

Basic: eg price per person, price per party

Extras: eg visas, additional excursions, upgrades, meal arrangements, activities, admission charges, local guides

Booking conditions: eg health and fitness, participant requirements, participant exclusions, special equipment required, medical requirements

Essential guidance for tutors

Delivery

This unit lends itself to delivery in diverse ways to suit local needs, and learner and tutor preferences. Learners already working for tour operators or in retail travel may already have some knowledge of special interest holidays and experience of making independent travel arrangements. Visits to providers and guest speakers are suggested in order to provide currency and specialist operational input.

The unit should start with an activity designed to explore independent and special interest travel. Learners' personal experiences might cover a range of experiences that could be shared with their peers and they should be guided to produce their own definitions.

Some tutor input into motivational theories such as Plog and Maslow would be a good starting point for discussion of factors influencing special interest holidays, the reasons why people choose to travel independently, and the pros and cons of independent travel.

Learners could work in groups to investigate the scope of different types of special interest travel, identifying providers and typical types of holidays. A class display could be made to record their findings.

Learners should be aware of CAA and Package Travel Regulations requirements for ATOL protection and should investigate current protection for people booking holidays independently.

Tutors should introduce learners to a wide range of information sources and provide practical activities to enable learners to develop skills and confidence when using them.

Learners should be shown how to construct full and accurate itineraries and should discuss the consequences of providing customers with incorrect information.

Tutors should provide customer profiles for learning outcomes 2, 3 and 4; learners could make up their own profiles for their colleagues too. They will need access to the internet and to brochures and travel guides in order to construct itineraries and cost suitable holidays matching customer profiles. Practical activities should be devised to enable learners to interpret and provide information and calculate costs for a wide range of special interest holidays and independent travel. Class activities should be developed to encourage broad research, incorporating different types of special interest and independent holidays. Practice involving activities such as role plays and responding to email enquiries will help to prepare for assessment.

Assessment

In this unit learners must demonstrate that they can plan and construct itineraries and calculate the cost of special interest and independent holidays. Those learners already working in travel and tourism may be able to perform some tasks as part of their employment. Learners not yet in work will be required to undertake the tasks in simulated scenarios. Learners must also provide supporting written or verbal evidence to demonstrate that they have the underpinning knowledge and understanding of independent and special interest customers. Examples of assessments are provided below.

Assessment criteria 1.1–1.7

For learning outcome 1, learners must demonstrate their understanding of independent and special interest travel customers. These criteria could be assessed by the production of an introductory written report or presentation.

To achieve 1.1, learners must analyse customers' motivation to travel using motivation theories, for example Plog, to support their analysis.

To achieve 1.2, learners must define 'independent' travel in their own words and give examples.

To achieve 1.3, learners must define 'special interest' travel in their own words and give examples.

To achieve 1.4, learners must give and explain four reasons why people choose to travel independently.

To achieve 1.5, learners must explain at least three factors influencing special interest holidays.

To achieve 1.6, learners must explain two benefits and two limitations to customers of independent travel.

To achieve 1.7, learners must explain the role of ATOL in relation to providing independent inclusive tours to customers and identify links to the CAA and the Package Travel Regulations.

Assessment criteria 2.1–2.8, 3.1–3.5, 4.1–4.8

Learning outcomes 2, 3 and 4 require learners to plan and construct itineraries for travel and tourism customers, calculate the cost of special interest holidays and calculate the cost of independent travel.

Tutors should devise pen portraits of customers to be selected by learners, ensuring that these are sufficiently detailed to allow learners to meet all of the assessment criteria for planning and constructing itineraries for travel and tourism customers, calculating the cost of special interest holidays and calculating the cost of independent travel.

For learning outcome 2 learners must demonstrate their ability to plan and construct itineraries for travel and tourism customers.

To achieve 2.1, learners must plan travel arrangements for travel and tourism customers. It is recommended that a variety of pen portraits are devised, addressing a range of special interest holidays and independent travel, from which learners must select six for assessment purposes (three for special interest holidays and three for independent travel). Assessment criteria 2.2—2.8 support this.

To achieve 2.2, learners must construct itineraries for the selected travel and tourism customers (six itineraries in all, covering all items listed in the unit content).

To achieve 2.3, learners must identify sources of information to support the planning of travel arrangements.

To achieve 2.4, learners must describe the planning process for special interest and independent travel.

To achieve 2.5, learners must identify elements of travel arrangements to meet customer requirements.

To achieve 2.6, learners must explain the purpose of an itinerary.

To achieve 2.7, learners must explain the importance of constructing a full and accurate itinerary for travellers.

To achieve 2.8, learners must explain the consequences of providing customers with inaccurate itineraries.

For learning outcome 3, learners must demonstrate their ability to calculate the cost of special interest holidays.

To achieve 3.1, learners must interpret information for customers from a variety of sources.

To achieve 3.2, learners must calculate costs of special interest holidays.

To achieve 3.3, learners must identify sources of information on special interest holidays.

To achieve 3.4, learners must identify components of special interest holidays.

To achieve 3.5, learners must explain chargeable extras for special interest holidays.

For learning outcome 4, learners must demonstrate their ability to calculate the cost of independent travel.

To achieve 4.1, learners must interpret information for customers from variety of sources.

To achieve 4.2, learners must calculate costs of independent travel.

To achieve 4.3, learners must describe elements of independent travel.

To achieve 4.4, learners must identify the cost of each element of the itinerary.

To achieve 4.5, learners must identify correct charges for extras that may apply to the travel arrangements.

To achieve 4.6, learners must describe how to convert costs given in foreign currencies into sterling.

To achieve 4.7, learners must explain how travel agents can make a profit from independent travel arrangements.

To achieve 4.8, learners must explain booking conditions which may apply to independent travel arrangements.

If role play or presentations are used for any part of this unit, they must be evidenced through detailed observation records, stating clearly how the learner has met the assessment requirements and they should also be supported by PowerPoint slides, computer printouts, screenshots etc. Observation records must be signed and dated by the assessor and learner and, together with the supporting documentation, be sufficiently detailed to enable others to make a judgement as to whether the evidence meets the specified criteria. Detailed witness statements and supporting documentation must be provided to support any work-based assessment evidence.

Essential resources

Learners should have access to the internet, as well as atlases and specialist holiday brochures.

Indicative resource materials

Textbooks

Dale G – *BTEC Level 3 National Travel and Tourism Student Book 1* (Pearson, 2010) ISBN 9781846907272

Douglas N et al – *Special Interest Tourism* (Wiley, 2001) ISBN 9780471421719

Swarbrooke J et al – *Adventure Tourism: The New Frontier* (Butterworth-Heinemann, 2003) ISBN 9780750651868

World Travel Atlas, Tenth Edition (Columbus Publishing, 2006) ISBN 9781902221939

Journals

Travel Trade Gazette – Reed Business Information

Websites

www.aito.co.uk	Association of Independent Tour Operators
www.atol.org.uk	Air Travel Organisers' Licensing
www.caa.co.uk	Civil Aviation Authority
www.direct.gov.uk	Package Travel Regulations
www.expedia.co.uk	Expedia
www.flightmapping.com	Flight planning
www.worldtravelguide.net	Columbus World Travel Guide

Most special interest tour operators, accommodation providers, transport operators and providers of ancillary products and services have websites.

Unit 19: Principles of Marketing for Travel and Tourism

Unit reference number: H/601/3319

Level: 3

Credit value: 8

Guided learning hours: 58

Unit aim

The aim of this unit is to provide the candidate with an understanding of the marketing function in the travel and tourism sector.

Unit introduction

Effective marketing is crucial to the success of travel and tourism organisations. In this unit learners will explore the function and practices of marketing. They will examine components of the marketing mix and consider market segmentation within travel and tourism.

There are many career opportunities for marketers in travel and tourism and learners will investigate the roles and responsibilities of marketing personnel.

Learners will explore different market research techniques and how these are developed and used by different travel and tourism organisations.

The internet has opened up a whole new world of opportunities to travel and tourism marketers. Learners will explore the benefits and limitations of the internet and judge its impact on travel and tourism marketing.

Learners will use practical skills to develop a marketing plan, consolidating much of the knowledge they have developed in this unit. This will benefit learners progressing to further study or employment in a marketing role.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand marketing in the travel and tourism industry	1.1	Explain the function and practices of marketing
	1.2	Explain the components of the marketing mix
	1.3	Explain the principle of market segmentation
	1.4	Identify market segments within the travel and tourism sector
	1.5	Describe the main roles of marketing departments
2 Understand how to conduct market research in the travel and tourism industry	2.1	Explain market research techniques
	2.2	Explain the importance of market research to understand customer behaviour
	2.3	Identify benefits and limitations of different market research techniques
	2.4	Describe methods of monitoring customer behaviour and collecting consumer feedback
	2.5	Explain the use of market research data for travel and tourism organisations
3 Understand the impact of internet marketing	3.1	Explain the benefits the internet provides for marketers
	3.2	Explain how internet marketing communications differ from traditional marketing communications
	3.3	Describe factors affecting the internet macro-environment
	3.4	Explain the benefits and limitations to travel and tourism organisations of internet marketing

Learning outcomes	Assessment criteria	
4 Be able to develop a marketing plan	4.1	Produce a marketing plan for travel and tourism businesses
	4.2	Explain the importance of businesses producing a marketing plan
	4.3	Identify the content of a marketing plan
	4.4	Explain how components of the marketing mix influence a marketing plan
	4.5	Describe marketing strategies for launching new products or services
	4.6	Describe marketing strategies for extending brands
	4.7	Describe strengths and weaknesses of types of promotional media
	4.8	Describe factors to consider when determining media used for marketing

Unit content

1 **Understand marketing in the travel and tourism industry**

Practices: marketing principles; SWOT; PEST

Marketing mix: 4Ps (product, price, promotion, place); product eg new product diffusion curve and product life cycle; price eg price levels and bands, cost plus and demand-led (seasonal) pricing; promotion eg advertising media and their impact, PR, brochures and leaflets, selling and sales promotion, internet; place eg distribution channels (including e-commerce), location, point of sale merchandising, accessibility; 7Ps (4Ps plus people, process and physical evidence)

Market segmentation/segments: total market; bases of segmentation eg age, family size and lifestyle, social class and income, geo-demographic techniques, behavioural, loyalty status; travel and tourism segmentation eg Plog

Roles: sales; product and brand management; advertising; market research; PR and media liaison

2 **Understand how to conduct market research in the travel and tourism industry**

Documentation: eg questionnaires, customer survey forms, observation checklist

Techniques: sampling principle eg basic distinction between random or semi-randomised and purposive (quota) sampling; quantitative and qualitative research; interviews and self-completion questionnaires; strengths and weaknesses of different MR methods; basics of questionnaire design

Monitoring: eg value of data on enquiries, bookings, sales of additional products and services, repeat bookings (churn rate)

Use: product development; improving quality; pricing; raising awareness; customer satisfaction

3 **Understand the impact of internet marketing**

Benefits: eg global reach, costs, measurable results, 24 hour marketing, lead times, personalisation, personal, conversion rates

Differ: eg flexibility, costs, accessibility and immediacy, personalisation, segmentation

Factors: eg social and ethical factors, privacy, technology, security, website design

Benefits: eg price, accessibility and immediacy, comparison shopping

Limitations: eg lack of third party help and advice, limited to those who access, less confidence in supplier and the validity of information, choice and competition, comparison shopping

4 **Be able to develop a marketing plan**

Marketing plan: business ideas eg product features and benefits, novelty and innovation, customer requirements, 'unique selling proposition', niche or mass market, competitor positioning; potential market eg market segments, customer profiles, estimating market size and market share

Marketing mix: 4Ps (product, price, promotion, place) and 7Ps (4Ps plus people, process and physical evidence); product eg new product diffusion curve and product life cycle; place eg distribution channels (including e-commerce), location, point of sale merchandising, accessibility

Extending brands: eg concept of brand as values and attributes that distinguish products or services, brand extension as application of brand to complementary products or services

Promotional media: eg advertising (TV, radio, press), brochures, websites, point of sale display, PR

Factors: eg cost, availability, access, relevance

Essential guidance for tutors

Delivery

Some learners may already be working in a marketing role and some may have studied marketing in a previous qualification, but others may be new to marketing. It is vital to determine learners' prior knowledge and understanding of what marketing is, its roles and its significance. This could be done through brainstorming and covered in one or two introductory sessions. The main roles of marketing departments and marketing personnel could be linked to the different functions so that learners have a clear idea of the many career opportunities available in a travel and tourism marketing environment.

Real examples of travel and tourism marketing should be explored throughout the unit. Learners who are already working in travel and tourism should be encouraged to research within their own organisation, and also in broader travel and tourism contexts. This could be achieved through relevant current examples from the industry, using material such as journals and newspapers, websites, brochures and leaflets, advertisements, questionnaires and feedback cards. Talks by marketing personnel from different types of travel and tourism organisations could be particularly useful. It is important that learners investigate a number of organisations in order to obtain a broad understanding of marketing in travel and tourism, from which they can select a range of examples to support assessment.

When discussing the marketing mix it is advisable to examine different organisations within the travel and tourism sector. Learners should examine the marketing mix in the context of the 4Ps and also the broader 7Ps. Learners should be encouraged to recognise different approaches to product, price, place and promotion, even within the same component industries. Some organisations can be used as good examples of a complex pricing strategy which ensures high sales, while others may be used as examples of organisations exploring different distribution channels or ensuring a high number of customers through an ideal location and perfect accessibility.

Research into a range of travel and tourism organisations can be useful to see market segmentation in practice. Learners will benefit from examining organisations within the same component industries, for example tour operators or visitor attractions targeting different market segments. Learners should be introduced to theorists such as Plog and have the opportunity to examine these theories in the context of travel and tourism organisations.

Delivery should include different market research techniques and how qualitative and quantitative methods are used to monitor and understand customer motivations and behaviour. Market research could be introduced by looking at a variety of questionnaires and feedback cards available from different travel and tourism organisations so that learners familiarise themselves with the types of questions, the length of questionnaires and the form of recording responses. For secondary market research learners could scrutinise sources such as the ABTA website, VisitBritain, StarUK, Office for National Statistics data or World Travel and Tourism Council research. Learners could work in groups to identify strengths and weaknesses of different techniques.

The internet has had a significant impact on travel and tourism marketing. Learners should research widely to explore examples of direct booking, national and international distribution, online research, advertising, promotions and marketing communications. Class discussions should be encouraged to assess the impact of the internet and learners will benefit from being able to interview marketers from a variety of travel and tourism organisations.

Learners will need some formal input into marketing planning. Guest speakers would be useful to talk through marketing initiatives, campaigns and planning. It would be appropriate to agree a format for marketing plans in preparation for assessment. Class-based group activities to develop marketing plans for hypothetical organisations may encourage healthy competition and learners will benefit from observing and giving feedback to others.

Tutors should ensure learners are familiar with all marketing terminology used in the unit content. It would be useful for learners to build up a glossary of terms.

Assessment

The unit will be assessed by assignments covering knowledge and understanding of the principles of marketing in travel and tourism.

Assessment criteria 1.1–1.5

To achieve learning outcome 1, learners must demonstrate their understanding of marketing within travel and tourism. Evidence could be presented in a number of different formats, for example, a written report or presentation.

To achieve 1.1, learners must explain the function and practices of marketing in travel and tourism. This should include a definition of marketing and a short explanation of the different roles of marketing, and how travel and tourism organisations use PEST and SWOT analyses to help inform marketing planning.

To achieve 1.2, learners must explain the components of the marketing mix including the 4 Ps and 7 Ps, as specified in the unit content. Although the explanation can be in general terms, links to travel and tourism organisations should be apparent and learners already working for a travel and tourism organisation may wish to explain the components in the context of their own organisation.

1.3 can be assessed in conjunction with 1.4. To achieve 1.3, learners must explain the principle of market segmentation, demonstrating awareness of the whole market and motivation theories, for example Plog. To achieve 1.4, learners must identify at least four different bases of market segmentation within the context of the travel and tourism sector.

To achieve 1.5, learners must describe the main roles of marketing departments including sales, product and brand management, advertising, market research and PR and media liaison. The description can be linked to a specific travel and tourism organisation, or it can be in general terms supported by travel and tourism examples.

Assessment criteria 2.1–2.5

For learning outcome 2, learners must demonstrate their understanding of how to conduct market research in the travel and tourism industry. Learners could make up a market research display showing examples of different market research techniques and documentation with supporting explanatory notes.

To achieve 2.1, learners must explain market research techniques. They should explain sampling principles and the distinction between different methods of sampling. Learners should explain qualitative and quantitative research and how interviews and self-completion questionnaires are used in travel and tourism, identifying different types of documentation used. The basics of questionnaire design should be highlighted.

To achieve 2.2, learners must explain why market research is important to travel and tourism organisations to understand customer behaviour.

To achieve 2.3, learners must identify benefits and limitations of different market research techniques. This could be produced in table format and should include strengths and weaknesses of qualitative and quantitative research and of at least three different market research methods.

To achieve 2.4, learners must describe at least three methods that can be used to monitor customer behaviour and collect consumer feedback.

To achieve 2.5, learners must explain, with examples, the use of market research data for travel and tourism organisations including product development, improving quality, pricing, raising awareness and customer satisfaction.

Assessment criteria 3.1-3.4

For learning outcome 3, learners must demonstrate their understanding of the impact of internet marketing. This would lend itself to a PowerPoint presentation addressing 3.1, 3.2, 3.3 and 3.4, with hyperlinks to provide travel and tourism examples of specific aspects of internet marketing.

To achieve 3.1, learners must explain the benefits the internet provides for marketers. This should include at least six benefits for the travel and tourism marketer.

To achieve 3.2, learners must explain how internet marketing communications differ from traditional marketing communications and should cover at least three differences, linked to travel and tourism.

To achieve 3.3, learners must describe at least three factors affecting the internet macro-environment.

To achieve 3.4, learners must explain three benefits and three limitations of internet marketing to travel and tourism organisations.

Assessment criteria 4.1-4.8

Learning outcome 4 requires learners to be able to develop a marketing plan. Ideally this will be based on a real organisation and, for those already employed in travel and tourism, it could be linked to the learner's place of work. Alternatively it may be based on a hypothetical organisation in a case study set by the tutor. The marketing plan could be presented to a panel in order to develop learners' presentation skills.

To achieve 4.2, learners must explain the importance of businesses producing a marketing plan. This could serve as an introduction to the task.

To achieve 4.1, learners must produce a marketing plan for a travel and tourism business incorporating business ideas and potential market.

Assessment criteria 4.3 to 4.8 should be achieved within the marketing plan.

To achieve 4.3, learners must identify the content of a marketing plan.

To achieve 4.4, learners must explain how components of the marketing mix influence a marketing plan. Both the 4Ps and the 7Ps should be considered in their work.

To achieve 4.5, learners must describe marketing strategies for launching new products or services.

To achieve 4.6, learners must describe marketing strategies for extending brands.

To achieve 4.7, learners must describe strengths and weaknesses of at least three different types of promotional media.

To achieve 4.8, learners must describe at least three factors to consider when determining media used for marketing.

Essential resources

For this unit learners need access to the internet in order to explore the web-based applications of marketing. They will also need access to published material such as the travel trade press, newspapers and textbooks. Use of tour operator brochures and other promotional material associated with the travel and tourism industry would be beneficial.

Indicative resource materials

Textbooks

Briggs S – *Successful Tourism Marketing* (Kogan Page, 2000) ISBN 9780749434694

Briggs S – *Successful Web Marketing for the Tourism and Leisure Sectors* (Kogan Page, 2001) ISBN 9780749435868

Hiam A – *Marketing for Dummies* (John Wiley & Sons, 2009) ISBN 9780470502105

Holloway C, Humphreys, Davidson, R – *The Business of Tourism* (Pearson, 2009) ISBN 9780273717102

Holloway C – *Marketing for Tourism* (Pearson, 2004) ISBN 9780273682295

Kotler P, Armstrong G, Wong V, Saunders J – *Principles of Marketing, Fifth Edition* (Pearson, 2010) ISBN 9780273743279

Kotler P, Bowen J, Makens J – *Marketing for Hospitality and Tourism* (Pearson, 2009) ISBN 9780132453134

Middleton V – *Marketing in Travel and Tourism* (Butterworth-Heinemann, 2009) ISBN 9780750686938

Journals

Journal of Travel and Tourism Marketing – Routledge

Marketing Week – Centaur Communications

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

www.marketingteacher.com	Marketing Teacher
www.starUK.org.uk	Star UK – statistics on tourism research
www.thetimes100.co.uk/theory	*The Times* — business studies theory
www.statistics.gov.uk	UK National Statistics
www.visitbritain.org/insightsandstatistics	VisitBritain — market intelligence
www.wttc.org/eng/Tourism_Research	World Travel & Tourism Council

Most travel and tourism organisations have websites to promote their products and services.

Unit 20: Development of Tour Operators' Products and Services

Unit reference number: **Y/601/3320**

Level: **3**

Credit value: **8**

Guided learning hours: **60**

Unit aim

The aim of this unit is to provide the candidate with a detailed knowledge of the role of the tour operator in the identification, development and launch of a new destination.

Unit introduction

Every year millions of people turn to tour operators to provide them with holidays in all corners of the world. In this unit learners will explore how different types of tour operators work with other component industries to develop their products and services. They will also explore the legislative and regulatory framework in which tour operators work.

Tour operators constantly strive to develop exciting new products, services and holiday experiences to meet the changing expectations of holidaymakers. Learners will research potential new developments and how trends and external influences impact on their product development. They will examine how destinations are affected by tourism, for better and for worse.

Learners will investigate the different stages involved when developing their products, including the stages of brochure production and the activities involved when promoting and launching new products and services to the public.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria	
1 Understand UK tour operators' products and services	1.1	Describe the components of package holidays
	1.2	Describe products and services offered by tour operators
	1.3	Explain why tour operators choose types of air transport components
	1.4	Explain extra products and services offered by tour operators in advance of the holiday
	1.5	Outline the effects of current legislation and industry codes on the tour operator
2 Be able to identify potential travel and tourism products and services	2.1	Research potential developments for new travel and tourism products and services
	2.2	Describe factors tour operators must research before offering new products and services
	2.3	Explain the effects of trends on tour operators' products
	2.4	Explain potential effects of tourism on a destination
	2.5	Explain how external influences affect the potential market size for a new product or service
3 Understand development schedules for new travel and tourism products and services	3.1	Explain the rationale behind development schedules
	3.2	Describe the stages in a development schedule
	3.3	Explain the importance of setting and working to 'SMART' targets
	3.4	Explain contracting arrangements for components of a package holiday
	3.5	Explain the elements to consider when costing new travel and tourism products and services

Learning outcomes	Assessment criteria
	3.6 Describe the key stages of brochure production
	3.7 Describe methods of product promotion used by tour operators

Unit content

1 **Understand UK tour operators' products and services**

Components: transport; accommodation; arrangements in resort eg information and advice, welcome party, excursions, in-resort representatives

Products: inbound; outbound; domestic; independent; specialist; integrated; mass market; short haul; long haul

Air transport components: time charter; series charter; part charter; ad hoc charters; scheduled services

Extra: eg pre-bookable flight seats, upgrades, meals, transfers, excursions, extended stays, admission tickets

Legislation: eg Package Travel Regulations, Disability Discrimination Act, Data Protection Act, Trade Descriptions Act, Unfair Contract Terms Act; Supply of Goods and Services Act; industry Codes of Conduct; requirements of the Civil Aviation Authority (Air Travel Organisers' Licence (ATOL))

2 **Be able to identify potential travel and tourism products and services**

Factors: eg holiday patterns, identification of any political or other reasons for destinations not to be visited, suitability for different types and ages of customer, business performance, tourist information, gaps in provision

Trends: types of package holiday already offered eg departure points, frequency and duration, price range, target market, increase/decline in popularity; gaps in provision eg departure points, frequency of flights and durations, limited capacity, resorts, accommodation types

Positive and negative effects of tourism: economic eg dependence, leakage of revenue, cost of infrastructure, increased property/land prices, employment, seasonality, terrorism/conflict, cost of living; environmental eg inappropriate/over development, use of resources, loss of habitats, flora and fauna, erosion, pollution, noise, litter, water usage and sewage, waste; social eg overcrowding, urbanisation, anti-social behaviour, drugs, alcohol, HIV/Aids, crime, child/sex tourism, prostitution; cultural eg traditions versus modernisation, language, customs, religion, music and crafts, cuisine, intergenerational conflict, promotion of local culture, disruption of communities

External influences: eg aircraft design, credit availability, exchange controls, consumer, social, economic, political

3 **Understand development schedules for new travel and tourism products and services**

Stages: contracting; costing; brochure production; processing procedures; operation of the programme; sales; marketing

SMART targets: specific; measurable; achievable; realistic; time bound

Contracting arrangements: commitment; allocation; ad hoc

Brochure production: layout; artwork; printing; photographs; copy writing; pricing; methods of distribution

Methods: eg events with travel agents and customers, launch activity, press trips, FAM (familiarisation) trips, flyers, leaflets, merchandising, website, brochure

Essential guidance for tutors

Delivery

A useful starting point is to consider the role of tour operators within the travel and tourism sector, and to define the following terms: inbound, outbound, domestic, independent, specialist, integrated, mass market, short haul, long haul.

Learners already working for a tour operator will be able to identify how their organisation links with other component industries when planning, selling and operating holiday packages. Research activities using tour operators' brochures and websites will enable learners to expand their knowledge across different types of tour operators. Learners, in pairs or small groups, could conduct research to identify tour operators within the different categories, and the range of products and services they offer.

Tutors may need to clarify the differences between charter and scheduled air transport components, and in particular the different ways of chartering aircraft – this can lead to interesting discussion on the commercial and operational aspects of charter and scheduled operations. Research into different tour operators' extra services should be carried out using websites and brochures, and learners could compare findings. While tour operators' brochures are a useful research tool, tutors should not advocate indiscriminate collection of tour operators' brochures.

The legal framework could be researched in small groups, culminating in short, informal presentations to highlight the key aspects of different acts, regulations, licenses, industry codes of conduct, and regulatory bodies. The focus of the research should be on their effect on tour operations.

Learners should have access to travel press such as the *Travel Trade Gazette* to keep abreast of trends and new developments in products, services and destinations.

Research activities could be developed to examine the factors that can impact on product development and external factors influencing market size. Learners should also investigate the potential effects of tourism on a destination; this can lead to interesting discussions about the moral responsibilities of tour operators.

Talks from a guest speaker or a visit to a large or medium-sized tour operator would be beneficial, so that learners can see how tour operators work and how the different functions are carried out. Activities using case studies can reinforce understanding of aspects such as different methods of contracting, currency considerations and costing strategies.

Learners should track the timescales and activities involved in brochure production, and gather examples of the many different methods used by tour operators to promote and launch their products to the public and travel trade.

Assessment

The unit will be assessed by assignments covering development of tour operators' products and services.

Assessment criteria 1.1–1.5

For learning outcome 1, learners must demonstrate their understanding of tour operators' products and services. Evidence could be presented in a number of different formats, for example, a written report, article or presentation.

To achieve 1.1, learners must describe the components of package holidays including transport, accommodation and arrangements in resort. The description can be in general terms but should include examples relating to different types of tour operators, such as how camping operators like Eurocamp work predominantly with ferry companies, whereas mass market tour operators like Thomas Cook offer most of their holidays by air.

To achieve 1.2, learners must describe products and services offered by tour operators. They should give a brief overview of the different categories of tour operators outlined in the unit content, provide at least one named tour operator in each category and give a general description of the products and services they offer.

To achieve 1.3, learners must explain why tour operators choose specific types of air transport components, covering all items in the unit content.

To achieve 1.4, learners must explain at least five extra products and services offered by tour operators in advance of the holiday, giving examples based on named tour operators.

To achieve 1.5, learners must outline the effects of current legislation and industry codes on the tour operator. This should include the effects of at least three current pieces of legislation, at least one code of conduct, for example ABTA, and also the current licensing requirements, for example ATOLs. The focus should be on their effects on tour operating, and not just outlining the legislation, licensing and codes.

Assessment criteria 2.1–2.5

For learning outcome 2, learners must be able to identify potential travel and tourism products and services.

To achieve 2.1, learners must research potential developments for new travel and tourism products and services. They should identify at least two potential new products and services for a named tour operator or operators. New products and services could relate to new destinations, different types of accommodation, different product mix etc. Learners working for a tour operator may wish to carry out research in relation to their employer. Evidence for 2.1 could take the form of a detailed product development proposal in written or presentation format.

To achieve 2.2, learners must describe at least four factors that tour operators must research before offering new products and services.

To achieve 2.3, learners must explain the effects of at least four trends on tour operators' products; the total evidence should include trends relating to types of package holidays already offered and also where there are gaps in provision.

To achieve 2.4, learners must explain at least four potential effects of tourism on a destination; these should include both positive and negative effects and must include at least one effect relating to each of economic, environmental, social and cultural.

To achieve 2.5, learners must explain how three external influences affect the potential market size for a tour operator's new product or service.

Assessment criteria 2.2 to 2.5 can be addressed before 2.1 or in conjunction with 2.1 if preferred.

Assessment criteria 3.1–3.7

For learning outcome 3, learners must demonstrate their understanding of development schedules for new travel and tourism products and services. This could be based on a presentation or a written review of development schedules. It could be based on one named tour operator or relate to tour operating in general.

To achieve 3.1, learners must explain the rationale behind development schedules, explaining why it is necessary for tour operators to work to detailed development schedules.

To achieve 3.2, learners must describe the stages in a development schedule; this should include all stages outlined in the unit content.

To achieve 3.3, learners must explain the importance of setting and working to 'SMART' targets when tour operators develop new travel and tourism products and services.

To achieve 3.4, learners must explain contracting arrangements for components of a package holiday, clarifying commitment, ad hoc and allocation methods of contracting. Evidence should address contracting for both accommodation and transport components.

To achieve 3.5, learners must explain the elements to consider when costing new travel and tourism products and services, for example inclusion of direct and indirect operating costs, profit, commission and taking into account external influences such as exchange rates.

To achieve 3.6, learners must describe the key stages of brochure production. This could be produced as an annotated flowchart describing briefly the stages listed in the unit content.

To achieve 3.7, learners must describe at least four methods of product promotion used by tour operators, providing relevant examples to support their descriptions.

Essential resources

Access to the internet and a wide range of tour operators' brochures is essential for delivery of this unit. Visits to the head office of a tour operator or talks from guest speakers are useful to support understanding of functional areas.

Indicative resource materials

Textbooks

Dale G – *BTEC Level 3 National Travel and Tourism Student Book 2* (Pearson, 2010) ISBN 9781846907289

Holloway C – *The Business of Tourism* (Pearson, 2009) ISBN 9780273717102

Journals

Travel Trade Gazette – Reed Business Information

Websites

www.abta.com	The Travel Association
www.aito.co.uk	Association of Independent Tour Operators
www.atol.org.uk	Air Travel Organisers' Licensing
www.caa.co.uk	Civil Aviation Authority
www.fto.co.uk	Federation of Tour Operators
www.ukinbound.co.uk	UKInbound

Most tour operators have websites, such as:

www.Cosmos-Holidays.co.uk	Cosmos
www.crystalski.co.uk	Crystal
www.eurocamp.co.uk	Eurocamp
www.exodus.co.uk	Exodus
www.firstchoice.co.uk	First Choice
www.kuoni.com	Kuoni
www.saga.co.uk	Saga Holidays
www.thomascook.com	Thomas Cook
www.thomson.co.uk	TUI/Thomson
www.virginholidays.co.uk	Virgin Holidays

Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details:
  qualifications.pearson.com/en/support/contact-us.html

- books, software and online resources for UK schools and colleges:
  www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))

- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)

- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)

- *Equality Policy* (Pearson)

- *Recognition of Prior Learning Policy and Process* (Pearson)

- *UK Information Manual* (Pearson)

- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme

- planning for assessment and grading

- developing effective assignments

- building your team and teamwork skills

- developing student-centred learning and teaching approaches

- building functional skills into your programme

- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (qualifications.pearson.com). You can request customised training through the website or by contacting one of our advisers in the Training from Pearson team via Customer Services to discuss your training needs.

Our customer service numbers are:

BTEC and NVQ   0844 576 0026

GCSE   0844 576 0027

GCE   0844 576 0025

The Diploma   0844 576 0028

DiDA and other qualifications   0844 576 0031

Calls may be recorded for training purposes.

The training we provide:

- is active – ideas are developed and applied

- is designed to be supportive and thought provoking

- builds on best practice.

Our training is underpinned by the LLUK standards for those preparing to teach and for those seeking evidence for their continuing professional development.

Annexe A

The Pearson/BTEC qualification framework for the Travel Services sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
8				
7				
6				
5		BTEC HND Diploma in Travel and Tourism Management		
4		BTEC HNC Diploma in Travel and Tourism Management		
3	AS/Advanced GCE in Travel and Tourism	BTEC Nationals in Travel and Tourism (Certificate, Subsidiary Diploma, Diploma, Extended Diploma)	BTEC Award in Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism BTEC Certificate in Travel Services	NVQ Diploma in Travel Services NVQ Certificate in Tourism Services

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
8		BTEC Firsts in Travel and Tourism (Certificate, Extended Certificate, Diploma)	BTEC Award in Principles of Customer Service in Hospitality, Leisure, Travel and Tourism BTEC Award in Cultural Awareness in Customer Service for Hospitality, Leisure, Travel and Tourism BTEC Award in Meeting the Requirements of Customers with Specific Needs in Hospitality, Leisure, Travel and Tourism BTEC Award in Welcoming Tourists and Visitors to their Destination in Hospitality, Leisure, Travel and Tourism BTEC Extended Award in the Principles of Customer Service in Hospitality, Leisure, Travel and Tourism BTEC Certificate in Travel Services	NVQ Diploma in Travel Services NVQ Certificate in Tourism Services
1			BTEC Award, Certificate, Diploma in Introduction to the Travel and Tourism industry	
Entry				

Annexe B

Wider curriculum mapping

Pearson BTEC level 2 and 3 qualifications give learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

Spiritual, moral, ethical, social and cultural issues

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

Citizenship

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

Environmental issues

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

European developments

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

Health and safety considerations

Health and safety is embedded within many of the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

Equal opportunities issues

There will be opportunities throughout this qualification to explore different kinds or rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.

Specification – Pearson BTEC Level 2 and 3 Certificates in Travel Services
– Issue 3 – October 2017 © Pearson Education Limited 2017

Annexe C

National Occupational Standards/mapping with NVQs

The grid below maps the knowledge covered in the Pearson BTEC Level 2 and 3 Certificates in Travel Services against the underpinning knowledge of the Level 2 and Level 3 NVQs in Travel Services.

KEY

\#   indicates partial coverage of the NVQ unit

a blank space indicates no coverage of the underpinning knowledge

Units	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Level 2 NVQ in Travel Services	#	#			#	#	#													
Level 3 NVQ in Travel Services								#		#					#		#			#

Annexe D

Mapping to Level 2 functional skills

Level 1	Unit number																			
English — Speaking, Listening and Communication	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**
Make a range of contributions to discussions in a range of contexts, including those that are unfamiliar, and make effective presentations	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
English — Reading																				
Select, read, understand and compare texts and use them to gather information, ideas, arguments and opinions			3	3	3	3	3	3		3	3	3	3	3		3	3	3	3	3
English — Writing																				
Write a range of texts, including extended written documents, communicating information, ideas and opinions, effectively and persuasively			3	3	3	3		3			3	3	3	3			3	3	3	3

Level 1	Unit number																			
Mathematics — representing	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Understand routine and non-routine problems in familiar and unfamiliar contexts and situations			3	3	3		3								3		3	3		
Identify the situation or problems and identify the mathematical methods needed to solve them			3	3	3		3								3		3	3		
Select a range of mathematics to find solutions			3	3	3		3								3		3	3		
Mathematics — analysing																				
Apply a range of mathematics to find solutions			3	3			3								3		3	3		
Use appropriate checking procedures and evaluate their effectiveness at each stage			3	3			3								3		3	3		
Mathematics — interpreting																				
Interpret and communicate solutions to multistage practical problems in familiar and unfamiliar contexts and situations																				
Draw conclusions and provide mathematical justifications																				

Level 1	Unit number																			
ICT — using ICT	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**
Plan solutions to complex tasks by analysing the necessary stages			3	3	3						3	3	3	3			3	3	3	
Select, interact with and use ICT systems safely and securely for a complex task in non-routine and unfamiliar contexts			3	3	3						3	3	3	3			3	3	3	
Manage information storage to enable efficient retrieval			3	3	3						3	3	3	3			3	3	3	
ICT — finding and selecting information																				
Use appropriate search techniques to locate and select relevant information	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Select information from a variety of sources to meet requirements of a complex task			3	3	3	3	3	3			3	3	3	3	3		3	3	3	3
ICT — developing, presenting and communicating information																				
Enter, develop and refine information using appropriate software to meet requirements of a complex task			3	3	3						3	3	3	3			3	3	3	

Level 1	Unit number																			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Use appropriate software to meet the requirements of a complex data-handling task				3													3			
Use communications software to meet requirements of a complex task				3	3												3			
Combine and present information in ways that are fit for purpose and audience	3	3	3	3	3	3	3				3	3	3	3			3	3	3	3
Evaluate the selection, use and effectiveness of ICT tools and facilities used to present information	3	3	3	3	3	3	3		3		3	3	3	3			3	3	3	3

Annexe E

Glossary of accreditation terminology

Accreditation start/end date	The first/last dates that Pearson can register learners for a qualification.
Certification end date	The last date on which a certificate may be issued by Pearson.
Credit value	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
Guided Learning Hours (GLH)	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
Learning Aims Database	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
Learning Aim Reference	Unique reference number given to the qualification by the funding authorities on accreditation.
Level	All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.
Performance tables	These qualifications are listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
Qualification Number (QN)	Unique reference number given to the qualification by the regulatory authorities on accreditation.
Register of Regulated Qualifications	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.
Section 96	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.
Title	The accredited title of the qualification.
UCAS points	These qualifications are listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

Annexe F

BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional qualifications	BTEC qualification suites
BTEC Level 7 Advanced Professional qualifications BTEC Advanced Professional Award, Certificate and Diploma	7	**BTEC Level 7 Professional qualifications** BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 6 Professional qualifications BTEC Professional Award, Certificate and Diploma	6	**BTEC Level 6 Professional qualifications** BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 5 Professional qualifications BTEC Professional Award, Certificate and Diploma	5	**BTEC Level 5 Professional qualifications** BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 5 Higher Nationals** BTEC Level 5 HND Diploma
BTEC Level 4 Professional qualifications BTEC Professional Award, Certificate and Diploma	4	**BTEC Level 4 Professional qualifications** BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 4 Higher Nationals** BTEC Level 4 HNC Diploma
BTEC Level 3 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	3	**BTEC Level 3 Specialist qualifications** BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 3 Nationals** BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional qualifications	BTEC qualification suites
BTEC Level 2 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**2**	**BTEC Level 2 Specialist qualifications** BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 2 Firsts** BTEC Level 2 Certificate, Extended Certificate and Diploma
BTEC Level 1 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**1**	**BTEC Level 1 Specialist qualifications** BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 1 qualifications** BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	E	**BTEC Entry Level Specialist qualifications** BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	**BTEC Entry Level qualifications (E3)** BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

NQF = National Qualifications Framework

For most qualifications on the **NQF**, the accreditation end date is normally 31 August 2010 or 31 December 2010.

Qualification sizes	
Award	1-12 credits
Certificate	13-36 credits
Diploma	37+ credits