

## LEARNING TOURISM

*Gordon Clark, Alan Heywood and Tara Sewell*

### Origins

The beginning, as so often, stemmed from a combination of events. The foot-and-mouth outbreak could not fail to bring home the dependence of Cumbria in particular on tourism and the vulnerability of the sector to 'external shocks'. Yet even prior to 2001 the north west's rural economy had not been booming in terms of visitor numbers; the industry was already facing challenges of competitiveness from other destinations. The consensus was that tourism needed to sharpen its act.

Around this time Lancaster University realised that it ought to be doing more to help the regional economy. The University had academic resources of world class that could be re-focused to benefit the north west. It just needed the drive of Professor Richard Davies (then a Pro-Vice-Chancellor) to gather together the appropriate talent within the University, and the funds newly available to the University from the European Regional Development Fund (ERDF). The Centre for North West Regional Studies also forced the pace by running a successful symposium in 2001 which brought together key figures in the NW tourist industry. In the resulting publication (*Tourism in Cumbria and Lancashire: recovery and progress*) the thrust of the action plan was that now (*post* foot-and-mouth) was the time for new thinking in tourism. These factors led to five pioneer projects being set up in the University to help the regional economy. *Learning Tourism* was the first to get off the ground in June 2002.

Alan Heywood was appointed Project Manager. His background was in the private sector of tourism including posts with American Express and Thomas Cook, and he had recently completed an MBA at Lancaster. Tara Sewell was also appointed. Her background was in the public-sector side of tourism, having worked for the North West Tourist Board and Lancaster City Council. Both were geographers by first degree so they fitted in

well to the Geography Department at Lancaster. The Project Director for *Learning Tourism* was Dr Gordon Clark, a senior lecturer in that Department who negotiated the contract to deliver the project.

Originally the project was set up to run for two years from 2002, but some early successes led to an extension of funding to allow it to run till December 2005, using nearly £500,000 of ERDF funding.

### **Tourism and Leisure in the North West**

The north west's countryside is famed for its tourism and leisure sectors and has been for generations. From the Cumbrian mountains to the seaside resorts along the Irish Sea coast, from pretty villages to cycle routes and scenic railways; there are numerous different ways in which the area pays its way through the spending power of visitors from the cities. Some leisure activities need little more than the scenery and topography of hill, river and coast, and that will be enough for the walker, climber or fisher. Other activities need rather more investment in hotels, sports sites and information provision. Time-share resorts and leisure parks are at the most intensive end of the spectrum of rural tourism.

We know that in Cheshire, Lancashire and Cumbria, tourism expenditure was about £1.5 billion in 1999. In some areas the tourism and leisure sector is the major source of employment. In recent years new large-scale attractions have opened in the North West – the Imperial War Museum North and Urbis (Manchester), the National Football Museum (Preston) and The Rum Story (Whitehaven). These have begun to challenge the traditional attractions of the region in an increasingly finite market of visitor numbers. The competition to attract tourist spending has increased with increasing affluence. Yet the pressures are considerable. The two-week family holiday in Britain has given way to shorter breaks in this country. Coastal resorts have suffered for over 30 years from competition from destinations in warmer parts of the world. The advent of budget airlines has intensified that pressure to travel further. Coupled with this has been a rise in visitor expectations, especially in accommodation

standards; en-suite facilities have become a necessity. Many North West resorts have an older infrastructure than their competitors, coupled with a marked reluctance to invest, which has held the sector back. Traditional activities like sailing and hiking have their faithful supporters, yet the fashion-driven element of leisure promotes new styles of activity – time-share and hang-gliding; extreme sports and health farms – which require continual innovation to stay in touch with the new sectors of the market. Overseas visitors are often high spending ones but how to attract them to the North West when the world is their oyster? The rise in wage rates in a labour-intensive sector means that cost-cutting is an obvious tactic, yet in a competitive world high quality and cost-cutting sit uneasily together.

Upgrading and innovation require capital and the ability to spot the new trends and be ahead of the game. Yet many small businesses now find that their revenue generated is much the same as it was in the late eighties. The best firms still need to attract their customers, so how do you advertise in affordable ways to get you noticed by the sorts of customers who might come to you? In a world of limited budgets advertising may seem a rather dark art. Does IT offer a way out? Might IT help marketing or reduce the cost of doing business? The equipment and skills needed for using IT effectively can be daunting. Often it will be the smaller firms that find these challenges most severe.

Yet the tourism and leisure sectors are a key element in the planned future of farming (a new source of income) and for rural communities. The counties and the North West Development Agency are all placing great store by the potential of tourism and leisure to bolster the rural economy, yet aware of the need to overcome weaknesses in what the region offers to ever-more-discerning customers.

### **Aims and methods**

‘Knowledge transfer’ is simply the latest phrase to describe the many ways in which a University can use the skills of its staff and students to benefit local firms. *Learning Tourism* focuses on small and medium-sized firms (SMEs) in those less well-off parts of

Cumbria and Lancashire (the so-called Objective 2 areas). These small firms often find it difficult to find the time or resources to research new ventures, train staff or do market research. Yet they are the part of the tourism industry in most need of updating and new ways of doing things – the creative use of IT, for example. The aim of *Learning Tourism* is to help small firms increase their turnover, create new jobs and become more competitive in the cut-throat world of leisure spending.

*Learning Tourism* works in four ways. The first is by offering small firms ‘graduate consultancies’. The project’s staff have worked with local tourism groups and local authorities to find firms who have projects for improving their businesses, the preparatory work for which they cannot fund themselves. *Learning Tourism* helps the firm refine the project, then recruits a University graduate to carry out 20 days of work on that project, at no cost to the firm.

The second element of our work is action learning. Groups of tourism practitioners will meet regularly in Cumbria or north Lancashire to plan and deliver a programme of mutual self-help on topics of common interest to the future success of their businesses. *Learning Tourism* provides a professional facilitator to help them in this.

The third element is a series of Tourism Briefing Papers. These are concise publications written by academics or leading tourism operators in the area. The Papers convey key messages about how tourism needs to change to meet today’s trading conditions, and suggest how to achieve this in a way that is feasible for small firms.

The final element is a website for the project. This is used to publish papers, support the action learning and recruit graduates for the consultancies.

## **Consultancies**

### *The background*

The aim of the consultancies is to help small tourism firms by recruiting Lancaster University graduates to work on projects the firms have devised to assist their businesses.

The business can tap into resources it might not otherwise be able afford or imagine it can access. The resulting piece of work should be of a quality that can provide sign posts for the firm to follow. This helps to break down any perceived or actual barriers between local firms and the University – each will learn from the other with a two-way flow of ideas and knowledge.

The university graduates, in an increasingly competitive job market, need to be able to prove they can translate their academic expertise into real-world applications. The consultancies give them the opportunity to show their paces.

Vital to the success of the project was how best to approach the businesses. Adopting a tele-sales approach could alienate the businesses, who are daily bombarded with offers of advertising space and website opportunities. An offer of free consultancy from a source not necessarily known to businesses might be treated with the same disdain as a double-glazing offer. Such an approach might fail to identify those companies with the ideas and drive to benefit from the consultancies. There was also a real danger that the team's work could be misinterpreted by other agencies in the tourism sector.

For these reasons the strategy adopted was, first, to engage with the 'umbrella organisations', that is, middle-tier organisations like Business Link, local government tourism and regeneration officers, tourism associations, National Farmers' Union and British Waterways. Once they are convinced of the project's merits, they could then promote it to the businesses in their sector. We were anxious that the agencies benefited within their local communities through working in partnership with us. By building these relationships the project has had some very fruitful results.

Because of our funding contract, *Learning Tourism* can assist only small or medium-sized firms in the tourism sector (those with less than 250 employees) and those situated in the Objective 2 areas of Cumbria (most of the county) and Lancashire (about half the county).

### *The process*

Once a business has contacted the *Learning Tourism* project team, the first step is a visit to their premises. This allows the project team to gain a rudimentary understanding of the business, its location and target market. Visiting the site begins the process of developing a relationship with the owner and demonstrates that the needs of the business are central to the project process. It is also vital that the owner is made aware of their own importance to the success of the project and that they have control at all stages.

During the first meeting, the owner is briefed on the background to the project and its aims and objectives. Care is taken to explain the process of recruiting the consultant. It is important that the owner understands that they are ultimately in control of the recruitment process and that a consultant has not already been identified. At the same time the project team begin to develop the project brief with the owner, by careful questioning and listening. Where possible, the team views the accommodation or attraction so that they understand fully the nature and needs of the business.

From this initial meeting a business brief is written. This outlines the background to the project and the opportunities identified. The brief is returned to the owner for approval or amendment. This part of the process is intrinsic to the acceptance of the project by both the owner and the project team. The approved brief forms the beginning of a contract with the business and is also the tool by which the consultant is recruited.

The recruitment process begins with a copy of the brief being posted on the project's website. At the same time copies are supplied to Lancaster University's Careers Service who display the brief within their offices and bulletin boards. The Careers Service

also has access to the NW SAGO (North West Students and Graduates On-line) internet site, which ensures that project details reach the Lancaster University graduate community outside the campus. The brief is also distributed to a number of departments around campus to display on their own websites and noticeboards. In addition, students and graduates who have previously expressed interest in the projects are e-mailed with an invitation to consider the opportunities.

As the project has evolved, and the competition for projects has increased, the selection process for the consultants has been refined. The potential consultants are now encouraged to treat each application as though it were for a permanent position, providing not only a CV but also a covering letter explaining their experience and why they believe they are the correct person for the position.

The CVs and letters are reviewed to draw up a shortlist of applicants which is forwarded to the owner to make the final selection. The owner is offered the opportunity to receive a telephone call from the shortlisted applicants to let him/her form an opinion based on more than is contained within the CV. This offer has been very well received and is a beneficial feature of the final selection of the consultant. Where a business has felt the shortlist does not match their expectations, the opportunity to repeat the process is offered. In such cases the second response has generally been greater and has produced well-qualified individuals who in the main have exceeded the owner's expectations.

Once selected, the consultant is placed under a temporary University contract and fully trained by the project team in consultancy work in general and in their specific project. It is made clear to the consultant at this point that the project is theirs to run, and that it is part of their duty to build and maintain a relationship with their client.

The time-scales and deliverables within the project are the subject of negotiation between the owner and consultant; ideally they form part of the initial contact with the client, but certainly should

be in place no later than their first meeting with the consultant. Although the end of the project for the consultant is the production of the final report, for *Learning Tourism* this is an interim stage. The project team maintains contact with the firm to assess the impact of the consultancy on the business in terms of jobs created or retained or additional turnover.

Within any consultancy an additional outcome for the Learning Tourism project would be if the consultant were either offered a permanent position of employment, or the business owner could see the merits of the delivered work and engaged the consultant as a separate transaction to take the work further.

#### *Consultancies: case studies*

##### *The restaurant conversion*

Shortly after moving her home away from her business, the owner of a long-established restaurant identified an opportunity to expand the business further into tourism. The vacated first floor provided the ideal opportunity for the owner to develop a quality bed-and-breakfast operation. It was important to the owner that the prospective B&B attracted the same type of clientele as the restaurant. After an introduction to the project by Business Link, *Learning Tourism* was able to recruit an Australian exchange student with a background in the Marriott Hotel chain (specifically with four-star properties) who is currently studying for a marketing degree at Lancaster. The consultant was able to research the property and market, and she produced a report which gave the business owner details of the conversion requirements stipulated by the English Tourism Council harmonisation accreditation scheme, including layouts, disability legislation and other legal requirements. In addition she also provided the owner with a marketing plan that suggested the market segments which should be targeted and ways in which the owner could package specific products to appeal to certain markets through the identification of partnerships with other local businesses. The report concluded by signposting means of further assistance. The business owner has since entered into private



negotiations with the consultant for additional work to transform the plan into reality.

*'She [the Consultant] has covered all the ground that I asked her to cover and more. I now have a much clearer idea of what to charge, the competition I am facing and the standards I should set' (Business owner)*

*'It [the Learning Tourism Project] has given me the confidence to know I have the ability to work in a consultancy role. I have also identified a number of work opportunities which I wouldn't have otherwise considered I had the knowledge or ability to do.' (The consultant)*

#### The ferry company

*Learning Tourism* was approached to work with a ferry company. They wished to assess the benefits of converting one of their fleet to use an electric engine and solar power. Through effective marketing the company wished to attract a greater number of passengers by emphasising the environmental benefits of this new technology, while at the same time disseminating the achievement and benefits to a wider audience, including the academic community. *Learning Tourism* recruited a consultant who wanted to develop a track record in the tourism sector and was willing to undertake the consultancy.

*'My consultant has the maturity and confidence to stand up to me and argue back, not something a younger person would have the confidence to do.' (Business owner)*

#### The farm diversification feasibility study

The opening of the Millennium Link in September 2002 connected the Lancaster Canal to the River Ribble and to the national canal network. British Waterways were able to introduce *Learning Tourism* to a farmer who was anxious to take advantage of the new opportunities provided by this linkage, to supplement a declining farm income. The farm was located alongside the canal. The farmer wished to investigate the possibility of providing moorings with services, and an adjacent caravan site. *Learning Tourism*

recruited a graduate who had recently completed his PhD. He took on the role of a catalyst, researching and contacting all the parties who provided assistance to farmers, then involving the agencies in a farm visit to draw up action plans and find possible sources of grant aid or professional help for the farmer. Without the assistance of the consultant the farmer would not have had the time or possibly the knowledge to involve outside agencies to assist his business, and so might not have been able to investigate his ideas.

### The art gallery

A noted rural arts centre needed help with marketing and sponsorship to attract interest and support for an exhibition of work by a leading Bauhaus artist. The Centre, a family enterprise, hosts exhibitions featuring local, regional and international artists, and it attracts visitors from all round the world. By recruiting a consultant the Centre was able to identify a publicity and marketing plan for the exhibition. By using the marketing plan as a tool, the consultant could seek appropriate private sponsorship for the event, and find outside partners for the launch, press coverage, signage, maps, educational flyers, by drawing on local services such as catering and accommodation providers. In addition the consultant was able to identify ways of attracting similar events and exhibitions to the Centre, drawing on their staff's personal artistic interests. *Learning Tourism* recruited a graduate from the Art Department whose ambition was to pursue an active career in art and studio management, though currently employed full time elsewhere. She worked at weekends and took annual leave to undertake the consultancy, because she saw it as a route to embark on her career ambition.

*'By working on the project, I have been able to gain new confidence in my artistic abilities, which I cannot explore in my current full-time role. I have made lots of new contacts who can hopefully help my artist career advance more rapidly' (The consultant)*

The watermill

A watermill in Cumbria concluded that the niche market it had enjoyed for a number of years was being eroded by the movement of the supermarkets into the supply of similar produce. The watermill owners knew that production, at the price levels and on the scale they could manage, was not sufficient to guarantee the business's survival. The owners had already developed a successful tea shop, helped by its location on a tourist railway and a major national cycleway. This tea shop used the mill's flour in its home-baked produce. The owners suspected that there was a market to attract the culinary tourist to learn how to use the organic flours at home. A Lancaster marketing graduate was recruited as the consultant to help the mill market itself effectively to the passing tourist trade and to become a specific destination for those wishing to gain a greater understanding of organic produce and its use in baked products.

*'Staying firmly in the saddle, we have [...], a graduate from Lancaster University, helping with marketing. Thanks to [...] we are producing a special bookmark-sized flyer encouraging some of the 15,000 cyclists who pass our door on the [...] cycle route to call in...'.(Quoted from the business owner's website)*

The sports club

The market for 'adrenaline tourism' continues to expand, with people seeking different thrills and experiences. A sports club sought *Learning Tourism's* assistance to help them market their facilities, which attract people looking for thrilling experiences on a one-off or regular basis. An additional factor in the club's plans for expansion was a capital project which had already been granted planning permission, but which would require substantial investment. The sports club wished to undertake an investigation into the additional use that could be made of its facilities to generate additional revenue over and above their current activity, in order to justify the new investment. The project was able to recruit an overseas student currently undertaking a Masters course at Lancaster to work with the sports club. The brief was to producing a plan for generating additional revenue, while also

being mindful of the legislation governing the type of activities the club wished to undertake.

### **Tourism Briefing Papers**

The idea behind the Tourism Briefing Papers is that small firms seeking to improve their performance can learn valuable lessons from both academics and leading practitioners in tourism. About half the 20 papers will be written by academics and the rest by practitioners. The thinking is that academics (though lacking frontline experience of how tourism firms work) do know about the longer-term changes in the economy and society which will eventually impact on tourism and for which the firms need to be preparing. Academics also know the latest research findings on how to organise tourism and manage firms, and tourism firms may benefit from knowing about this. Lancaster's Management School is one of the best in the UK, and social, cultural and tourism research are among the University's other strengths.

Of course, the very word 'academic' hints at the problem. The academics have to abandon the private language familiar to fellow experts and write in a way that anyone can grasp. They have to 'translate' the technicalities into ordinary speech, yet without losing the precision and judgement which are the hallmark of leading minds in their field. Furthermore, busy tourist operators do not have time to read long reviews - as a group they are notoriously 'time poor'. So, along with clarity and authority, the Papers must be brief. The task of the editor of the Papers is a critical one, otherwise they will go unread.

For the authors drawn from the leaders of tourism in practice, the task is different. They will know intimately the details of their own business and the story of how it became a success. But they have to be able to stand back from that personal detail and describe the elements of their success in a way that others could imitate or adapt. Again the editor has a key role in assisting the practitioner authors help their colleagues.

An interesting question is whether there are really 'two cultures' here, in this case the academic and the practical. Or are the two

sets of authors saying much the same thing albeit from different perspectives and in different words? It is a little too early judge this definitively but, based on the nine papers written so far and what we know of those in preparation, a number of themes are emerging about how the tourism and leisure sector in the North West should be developing.

The most pervasive is that firms will have to operate differently in the future; the *status quo* is not an option, if for no other reason than that it can no longer be afforded and the competitors are not standing still either. Staff training needs to be improved as they are often the public face of a quality tourism experience. Firms need to understand better how the expectations of tourists are changing – of the UK visitors and those from overseas, of young and old, and of wealthier and less well off. The paramount need for high quality (not necessarily with a price to match) is also stressed by many of the authors. Of course, there are many ‘best-practice guides’ and star-rating systems which define a sort of ‘quality’. But many of the authors also remind us that it is important for tourism here to be distinctive and rooted in the area’s features, not just a bland, could-be-anywhere experience. Some elements of quality simply are not captured by ‘the inspector who calls’ – friendliness, helpfulness, authority and tact, for example.

The growing series of Tourism Briefing Papers is available on request from the University (see the address below) and on the *Learning Tourism* website from which they can be downloaded free (<http://learningtourism.lancs.ac.uk>).

### **Action Learning**

Action Learning is recognised as one of the most effective means of communicating and instilling best practice and learning, particularly among small and medium-sized firms (SMEs). Lancaster University has developed a region-wide network of Action Learning Sets. Based on geographic clusters, SMEs with complementary objectives learn together for mutual benefit.

These Action Learning Sets work with a facilitator who provides support for SME owners and managers in the developmental process, sharing understanding of how they can help each other improve their businesses by becoming more enterprising and innovative. The facilitator (provided by the University) introduces themes for the Set meetings, and guest speakers on specialist topics contribute to some of the meetings. The facilitator assists the SME executives with quality decision-making and helps them to be more enterprising in the development of their businesses. Representatives from the Small Business Service attend the meetings where appropriate to facilitate inter-referral of SMEs and deal with forms of training or advice beyond the scope or timetable of this project.

Each of the action learning sets is operating differently to reflect the different challenges each area faces.

*The Blackpool group*

Following the release of the Blackpool Master Plan, the Blackpool Action Learning Set has encouraged key players from the accommodation providers' associations to come together – for the first time – to discuss constructively and openly the threats and opportunities presented by potential changes to Blackpool's infrastructure which have been highlighted by the plan.

The facilitator is Viv Cuthill from Lancaster University's Centre for Training and Development. She skilfully controls discussions so that individuals get the chance to air their views and concerns, which helps allay fears. Guest speakers including independent solicitors, accountants, planners and local council representatives have been invited to answer questions from the group. The intended outcome is for this Set to continue working to represent the entire accommodation sector in Blackpool, ensuring that together they can become better informed and have greater lobbying power to protect their members' interests.

*The Cumbria group*

The Cumbria Action Learning Set continues the work of its facilitator, Terry McCormick, who for the past four years has been working with cultural tourism businesses in Cumbria to help them understand how other attractions operate, so they can work together to promote and develop themselves. Under the working name of CulturalTourismWorks, the managers come together to review each other's facilities and provide a confidential but frank critique of the positive and negative aspects of each attraction, including physical infrastructure, and more emotional and spiritual aspects. The Set has welcomed guest speakers, such as Andrew Whitley from the Village Bakery in Melmerby, and also members of a group from the Historic House Network – a similar organisation in Stratford-upon-Avon. The peer-review sessions are recorded and condensed and the aim is that this material will be distributed in two formats. One will be an academic piece which examines the structure and outcomes of the Set within a management-learning framework. The other paper, which will be for circulation to the group members, the North West Development Agency, the Tourist Boards and Learning and Skills Council, could act as a template for how other groups could work together. This Set would like to continue working as a self-promotion body and continue peer-review sessions beyond the period of the *Learning Tourism* project.

**Website**

These days a website can be an invaluable tool for any organisation. It can be used for internal communications among the organisation's staff. Equally it can foster external communications between the project and the public who want to know what is being done. Our funders can check on our progress through the website. A website can also be a service to firms, acting as a 'portal', that is, a site which lists organisations and their websites which tourism firms may wish to contact.

It was natural to use the website as a recruitment tool to attract students, graduates and postgraduates to the consultancy opportunities available. Each vacancy is accompanied by a

downloadable WORD document, which outlines the consultancy brief. Students from across campus and from the SAGO notice board are redirected to the *Learning Tourism* website to identify opportunities. The website is also used as a vehicle for students to get examples of how to improve their CV, covering letter or interview techniques. The site signposts candidates towards the University's Careers Service who can advise graduates on how to secure other forms of employment. We also use the website to recruit firms in need of consultancies, indicating what we can do for their businesses and explaining how other projects have worked. So, the website is a very useful tool for successful consultancies.

The website is one means we use of publishing the Tourism Briefing Papers. Each can be freely downloaded from the website so that tourism operators, regional agencies and academics can access this resource to draw on the examples of best practice and gain a better understanding of how the industry in the north west specifically, but not exclusively, has developed and grown.

The website has the facility of an online communication tool, currently facilitated by Blackboard™. Using both the notice board and the real-time chat facility the project team encourages the Action Learning Set members to use this facility to develop a wider discussion about the topics covered during the Sets' meetings. There is also the facility for Steering Group members to use this facility to talk about project issues, and to discuss other industry issues. It is increasingly apparent, however, that in the pressured world of tourism, it is often easier to pick up the telephone than be distracted by online discussions during the working day.

The website itself was set up quickly at the start of the project to provide a basic service. It is currently being improved in terms of layout, appearance and navigation to give a more user-friendly face to the project. The *Learning Tourism* website can be viewed at <http://learningtourism.lancs.ac.uk>.



## **The future**

It is still too early to judge the overall success of the *Learning Tourism* project. We do not yet know whether our interventions will lead to new jobs, increased turnover or more competitive businesses. We shall judge that in 2005. The overall state of the economy, the value of sterling and the effects of 'external shocks' like the Iraq war and SARS could be influential. But we can say that in just nine months we are over halfway towards our target number of companies to whom we can offer a graduate consultancy. That most valuable tool of tourism marketing 'word of mouth' seems to be generating new interest in what we can offer, without our having to do much formal advertising - surely the mark of a successful venture.

## **Contact**

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