

**Welcome to Excellence in England Research**  
Final Report

October 2005



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# Executive Summary

## Background and Methodology

In order to evaluate the impact of the Welcome to Excellence training programmes in England, Tourism South East on behalf of the regional tourism organisations commissioned TNS Travel and Tourism to undertake a programme of research. The core methodology undertaken was a postal self-completion survey amongst a sample of both customers and non-customers.

In total, 4,500 questionnaires were mailed out across the regional tourism organisations. Tourism South East, Visit Heart of England and Lancashire and Blackpool Tourist Board (on behalf of the North West Region) each paid an additional fee to boost the sample in their area. After a programme of reminders, a total of 944 completed questionnaires were returned, giving an overall response rate of almost 20%. In order to assist in the identification of the research issues and to enrich the findings from the quantitative research, a programme of 12 in-depth consultations with customers was also undertaken.

## Main Findings

**TYPE OF BUSINESS:** Over half the businesses in the sample operated in the private sector (55%). In terms of types of business, the largest proportion of the total sample were hotels (20%), guest houses or bed and breakfasts (18%) and visitor attractions (18%).

**SIZE OF BUSINESS:** Half of all businesses in the sample were relatively small, employing 15 or fewer staff (51%). Almost a third had 16-100 employees (31%) and the remaining 16% employed 100 or more staff.

**HOW FIRST FOUND OUT ABOUT WELCOME TO EXCELLENCE:** The largest proportion of businesses first found out about the courses through direct mail from their regional tourism organisation or tourist board (67%).

**AWARENESS LEVELS:** The vast majority of respondents were aware of Welcome Host (93%). The lowest levels of awareness were recorded for Welcome E-business (40%) and Welcome Line (39%).

**PARTICIPATION LEVELS:** Welcome Host was by some considerable margin the most popular course which respondents (and/or their staff) had participated in the *last three years* (67%). One in five respondents claimed they had not participated in any of these courses in the last three years (21%). Welcome Host was once again the most commonly mentioned Welcome to Excellence course which respondents had ever participated in (77%).

**DELIVERY METHODS:** Open courses were the most popular type of delivery method both in terms of awareness levels (81%) and method used most often (76%). Significantly lower levels of awareness and usage were recorded for in-house and corporate delivery methods.

**REASONS FOR PARTICIPATION:** The two primary unprompted reasons for participating in the Welcome to Excellence training courses were to improve and develop staff (31%) and to improve the level of customer service provided (30%). To provide high standards of customer service and to enhance individual skills were the two most important prompted reasons for participating in the course(s), with at least 8 in 10 respondents stating these reasons were 'very important' in their decision to participate (88% and 80% respectively).

**FUNDING:** For the largest proportion of the sample, their Welcome to Excellence training was paid for in full by the company (57%). Less than a third of respondents received subsidies from the public sector (31%).

**BARRIERS TO PARTICIPATION:** The main unprompted reason for non-participation in the Welcome to Excellence courses in the last three years was because the dates and timings were not convenient (30%). Time constraints and the fact the some courses were seen as not relevant to the businesses were the most common prompted reasons for not participating.

**LIKELIHOOD TO PARTICIPATE IN FUTURE:** Around half of lapsed and non-users of the Welcome to Excellence training courses indicated they would be likely to participate in the future (51%). Amongst those who were unlikely to participate, the main reason given was that the courses were not relevant.

**LEVELS OF SATISFACTION:** Respondents participating in a course in the last three years were asked to express their levels of satisfaction with 6 key elements of all the courses on a 5-point scale from 'very satisfied'=5 to 'not at all satisfied'=1 and mean scores were calculated. The levels of satisfaction recorded for Welcome All were the highest recorded

across the suite of Welcome to Excellence training courses (98%). Overall, very high levels of satisfaction were expressed for Welcome Host. For all aspects rated, at least 90% of respondents claimed they were satisfied. Satisfaction levels for Welcome Host Plus were very high, indeed they were slightly higher than those recorded for Welcome Host. Although still relatively high, the lowest levels of satisfaction were recorded for Welcome E-business (89%).

**OTHER CUSTOMER SERVICE COURSES:** Almost a third of respondents had experience of another customer service course (31%) and the main type undertaken was their own company in-house training. The largest proportion of respondents who had experienced other types of customer service training were of the view that they were comparable to Welcome to Excellence courses (69%). However, more than 1 in 5 respondents believed that other courses were better.

**OVERALL RATING OF PARTICIPATION:** Illustrating the high levels of satisfaction experienced with the Welcome to Excellence courses, more than two-fifths of respondents stated that the courses were better than they expected (42%).

**IMPACTS OF PARTICIPATION:** By far the main prompted impact of participation in Welcome to Excellence was on the skills of staff and students. The opportunities to meet/network with others and to give staff more confidence and broaden their knowledge were the other main benefits of participation on an unprompted basis.

**IMPROVEMENTS AND RECOMMENDATIONS:** Emphasising the high levels of satisfaction with the courses, over three-quarters of respondents were unable to suggest any improvements or stated that nothing could be improved (77%). Over half of respondents were unsure if there was any need for additional courses to be added to the Welcome to Excellence series (57%). Amongst those who were of the opinion there was a need for additional courses (17%), a sales and retail course, dealing with difficult customers was the type most requested.

**FUTURE INFORMATION:** On average, a slightly higher proportion of respondents expressed a preference to receive information about Welcome to Excellence by direct mail (55%) compared to e-mail (42%).

## Key Conclusions

The principal role played by the regional tourism organisations in the promotion of the Welcome to Excellence courses was evident from the research with the majority of respondents indicating they first heard about the courses from their regional tourism organisation. However, informal sources, particularly word of mouth recommendation from colleagues or other delegates on course(s) were also highlighted as influential in raising the awareness and encouraging participation of further courses.

Although awareness and participation levels of Welcome Host were very high, the comparative results for many of the other courses were markedly lower, particularly for Welcome Line and Welcome E-business. We believe these results highlight an opportunity for further promotional activity to increase awareness of the other courses in the brand.

In terms of the delivery methods used, awareness and usage levels of the 'open course' method were significantly higher than for both in-house and corporate training methods. Given the advantages offered by the in-house and corporate methods, primarily in terms of the time savings, we believe there is merit in encouraging the use of these other delivery methods where appropriate.

Although the enhancement of staff skills and the provision of a high standard of customer service were the key benefits and reasons for taking part in the Welcome to Excellence courses, it was widely recognised that any improvements in these areas were likely to have an indirect impact, on a number of areas of business performance including the recruitment and retention of staff, the level of repeat business and profitability levels. Networking opportunities with other participants on the course was also considered to be an important advantage of participation.

The high levels of satisfaction with the Welcome to Excellence courses were illustrated by the fact that two-fifths of respondents rated their participation as 'better than expected' and for each of the courses approximately 90% or more respondents were satisfied with each element of the course rated in the survey. In addition to this, the majority of respondents were unable to suggest any improvements. Nevertheless, although only mentioned by a relatively small proportion of respondents, it is worth highlighting that increased flexibility in terms of timings and dates for running open courses would improve participation as would ensuring the courses were tailored to the participating organisations.

# A. Background and Introduction

## Background

Welcome to Excellence is a national customer service training initiative managed and developed by the regional tourism organisations in England. It started with the Welcome Host training programme, which was developed and launched by the Wales Tourist Board 14 years ago. An English version was then developed by the English Tourist Board and launched in 1993, which was delivered through the English regional tourist boards.

Over the last 10 years, a wide range of one-day training programmes have been developed and the programmes have been regularly updated in order to meet needs identified by research. In 2003, a new Welcome to Excellence branding for England was launched by the English Tourism Council to encompass all of the training programmes.

Welcome to Excellence aims to enable individuals in the tourism workforce to develop customer service skills, thus enhancing the quality of service provided by tourism organisations and increasing their competitiveness and productivity.

Presently, seven one-day training courses are included in the Welcome to Excellence brand:

- Welcome Host;
- Welcome Host Plus;
- Welcome All;
- Welcome E-business;
- Welcome International;
- Welcome Line
- Welcome Management.

The participants of these courses include private sector businesses, primarily operating in the tourism industry, public sector and voluntary organisations, and education establishments. In the financial year of 2003/04, more than 21,000 people participated in the Welcome to Excellence training courses in England, including approximately 16,600 in Welcome Host.

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Welcome to Excellence training is available through open, in-house and corporate programmes (where trainers within an organisation are briefed to enable them to deliver the training to their own employees, volunteers or students). The marketing and delivery is undertaken regionally by the appropriate tourism organisations in each of the nine regions.

### **Objectives**

In order to evaluate the impact of the Welcome to Excellence training programmes in England, Tourism South East on behalf of the regional tourism organisations commissioned TNS Travel and Tourism to undertake a programme of research. The specific objectives of the study were to identify:

- how organisations heard of Welcome to Excellence;
- the level of awareness of the full range of Welcome to Excellence training programmes and delivery methods among existing customers;
- reasons for participating in the Welcome to Excellence training programmes;
- the perceived impact of participation;
- the relevance of the content and appropriateness of delivery methods;
- perceived price sensibility and value for money;
- if organisations had used other customer service training programmes and, if so, which ones;
- suggestions for practical improvements in the content, delivery and administration of the training;
- any suggestions for new training programmes to meet industry standards.

To fully meet the survey objectives, it was decided to undertake a combined qualitative and quantitative methodology.

### **Qualitative research**

In order to assist in the identification of research issues and to enrich the findings from the quantitative element of the research, a programme of in-depth telephone consultations were undertaken with customers of the Welcome to Excellence training courses in England.

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A sample of 3-4 participants were provided by each regional tourism organisation and from this list a total of 12 consultations were completed. These consultations encompassed a geographical spread of businesses across the regional tourism organisations and also a range of delivery methods.

The majority of the consultations were undertaken by an experienced researcher from TNS. However, two of the consultations were completed by a member of Tourism South East and the responses were provided to TNS for analysis. On average, each consultation lasted 30-45 minutes. All consultations were undertaken in June and July 2005.

### **Quantitative research**

A quantitative methodology was essential to quantify the findings of the in-depth consultations and as a means to measure views and opinions of respondents. The core methodology used in this research was a postal self-completion survey amongst a sample of both customers and non-customers of the Welcome to Excellence training courses in England. The self-completion methodology offered the most appropriate and cost-effective methodology. It allows the respondent to complete the survey at a time convenient to them and also gives them the opportunity to look for relevant facts and figures prior to returning the questionnaire.

In total, 4,500 questionnaires were mailed out across the regional tourism organisations in England. 6 out of the 9 regional tourism organisations mailed out 350 questionnaires. Tourism South East, Visit Heart of England and Lancashire and Blackpool Tourist Board (on behalf of the North West region), each paid an additional fee to boost their sample and therefore each of these areas sent out a total of 800 questionnaires.

In order to increase the sample sizes in those areas which had lower response rates, a programme of reminders were sent out to some areas. In total, 944 completed questionnaires were returned, giving an overall response rate of almost 20%. It should be noted that as the response rates in the survey across the regional tourism organisations were in most areas reflective of the overall participation levels it was decided not to weight the survey results.

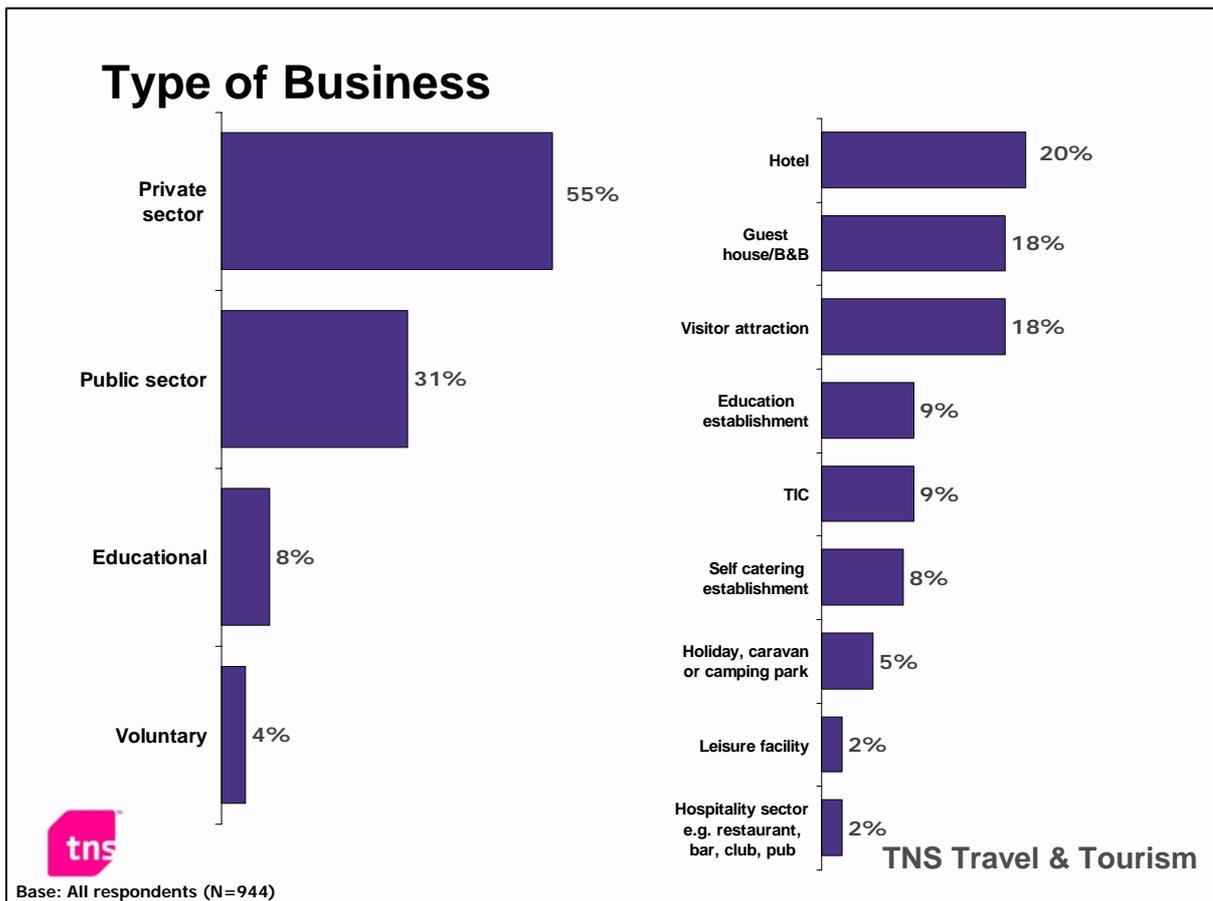
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## B. Main Findings

This section of the report presents an interpretation and analysis of the full results and findings to emerge from both the self-completion survey and programme of depth telephone consultations.

### Profile Information

The purpose of the first series of questions in the survey was to gather profile information on the businesses.



### *England overall*

Over half the sample of businesses in the survey were in the private sector (55%) and almost a third indicated they were in the public sector (31%). The remainder of the sample were education establishments or in the voluntary sector (12%). Further analysis of the data reveals there was a higher proportion of private sector organisations in the following areas – Cumbria (70%), South West (80%) and Yorkshire (84%). In contrast, an above average proportion of respondents working in the public sector were found in Heart of England (41%), North West (42%) and London (41%). In terms of the voluntary and education sector, London had a higher proportion of these types of businesses in their sample – 11% and 32% respectively.

In terms of the type of business, hotels (20%), guest houses and bed and breakfasts (18%) and visitor attractions (18%) each accounted for around a fifth of the total sample. It should be noted that respondents self defined their type of business. In total, accommodation establishments accounted for approximately half of the total sample (51%). Almost one in ten businesses were found in each of the following sectors – education establishments (9%), tourist information centres (9%) and self catering establishments (8%). Other types of businesses covered in the survey but accounting for 1% or less of the total sample included: conference or exhibition centres, transport businesses, shopping centre or retail facilities, churches or cathedrals, youth hostels, theatres, activity/adventure/outdoor events centre, museums, local authorities or chambers of commerce.

Not surprisingly, there were considerable variations in the types of businesses across the 9 regions. For example, an above average proportion of hotels were found in Cumbria (36%) and the South West (29%), but considerably lower proportions were found in the Heart of England (6%). Guest houses and bed and breakfasts were most evident in Yorkshire (44%) and the South West (34%), but less so in the East of England (7%). Visitor attractions were most likely to be found in the Heart of England (35%) and least likely to be in the South West (7%). An above average proportion of TICs were in the Heart of England (17%) and the North West (15%). Educational establishments were more likely to be located in London (43%) and the North East (17%).

### **Key points**

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**Over half the businesses in the sample operated in the private sector (55%). In terms of types of business, the largest proportion of the total sample were hotels (20%), guest houses or bed and breakfasts (18%) and visitor attractions (18%).**

*Booster areas*

*South East and Dorset<sup>1</sup>* – The largest proportions of the sample in this area were: hotels (24%), visitor attractions (20%), guest houses or bed and breakfasts (15%), education establishments (13%) and TICs (11%). In total, just over half the sample was private sector organisations (53%).

*Heart of England* – Visitors attractions accounted for over a third of the sample in this area (35%). A further 17% of the sample were TICs, 13% were guest houses and bed and breakfasts (13%) and 9% were self catering establishments. Less than half the sample was in the private sector (48%) and a slightly lower proportion operated in the public sector (41%).

*North West* – A quarter of businesses in the North West were hotels (25%), 16% were guest houses or bed and breakfasts, 15% were TICs and 11% were visitor attractions. Just under half the sample were in the private sector (46%) and 42% were public sector organisations.

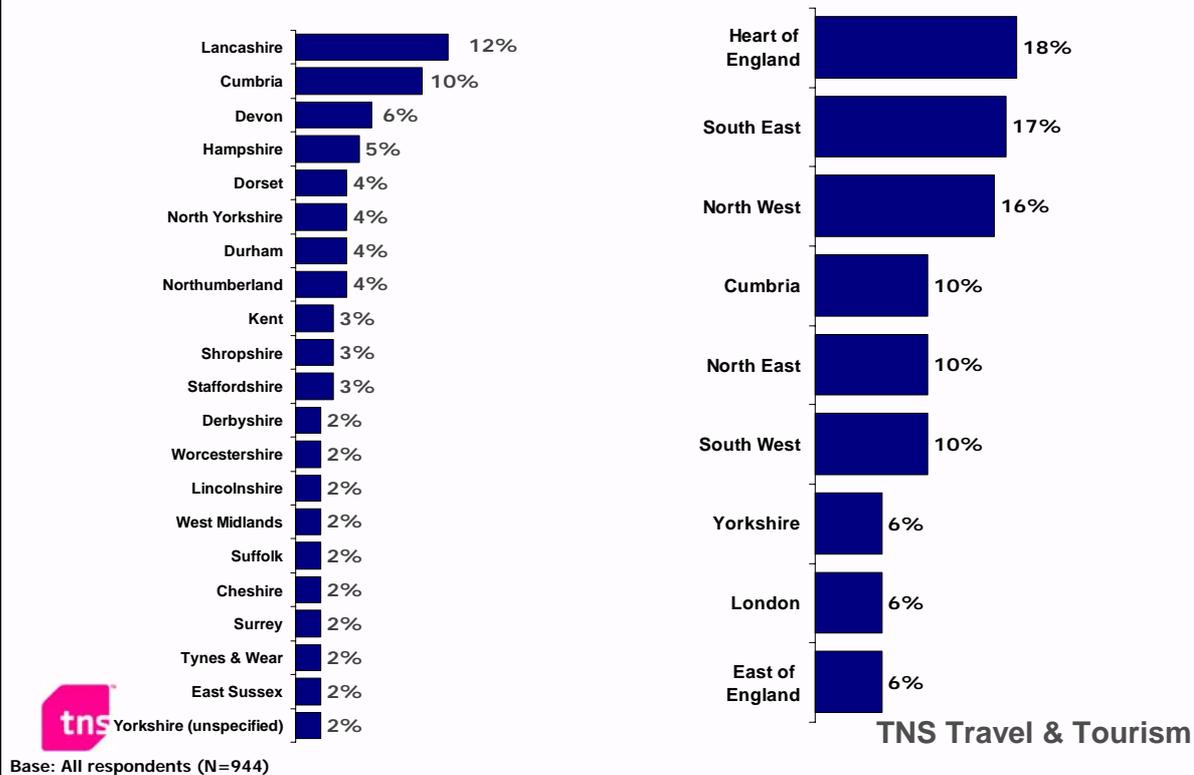
In the 12 depth interviews, there was a mix of different types of businesses contacted including, 4 accommodation establishments, 2 leisure facilities, 2 education establishments, a visitor attraction, tourist information centre, local authority and the Forestry Commission.

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<sup>1</sup> With effect from 1<sup>st</sup> April 2003, regional tourist board boundaries were aligned with those of their sponsor; Regional Development Agencies. Consequently Dorset was transferred to South West Tourism region.

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## Location of Business



### *England overall*

All businesses were asked to specify the English county in which they were located or if they were London based, the name of the borough. Those counties and boroughs cited by more than 1% of the sample are presented in the chart above. 1 in 8 of the sample were from Lancashire (12%) and 1 in 10 were from Cumbria (10%). The next most important sources of respondents were Devon (6%) and Hampshire (5%).

In addition to an analysis of responses at county level, the sample was also segmented into the 9 regional tourism organisation areas. This geographical split will be used throughout the report to analyse the results at a regional level. It should be noted that this breakdown reflects the number of questionnaires sent out and the response rates in each region. Nevertheless, for most areas the proportion of questionnaires returned was reflective of overall participation rates in Welcome to Excellence training courses over the last year or so. The main exception was perhaps London which had a notably lower response level and Cumbria which had a higher level of returns than actual participation rates in the

region. It is worth highlighting that lower response rate in the London area is typical in market research surveys.

As illustrated above, approximately 1 in 6 respondents were from each of the following areas: Heart of England (18%), South East (17%) and the North West (16%). A further tenth of respondents were from Cumbria, the North East and the South West (10% from each area).

### **Key points**

**Reflecting participation levels in the Welcome to Excellence training courses in England, the largest proportions of businesses in the sample were from the Heart of England (18%), the South East (17%) and the North West (16%). At the county level, Lancashire (12%) and Cumbria (10%) were the main sources.**

#### *Booster areas*

*South East and Dorset* – The main source of respondents from the South East were Hampshire (28%), Dorset (18%), Kent (14%), East Sussex (9%), Surrey (8%), West Sussex (5%), Oxfordshire (5%) and Berkshire (5%).

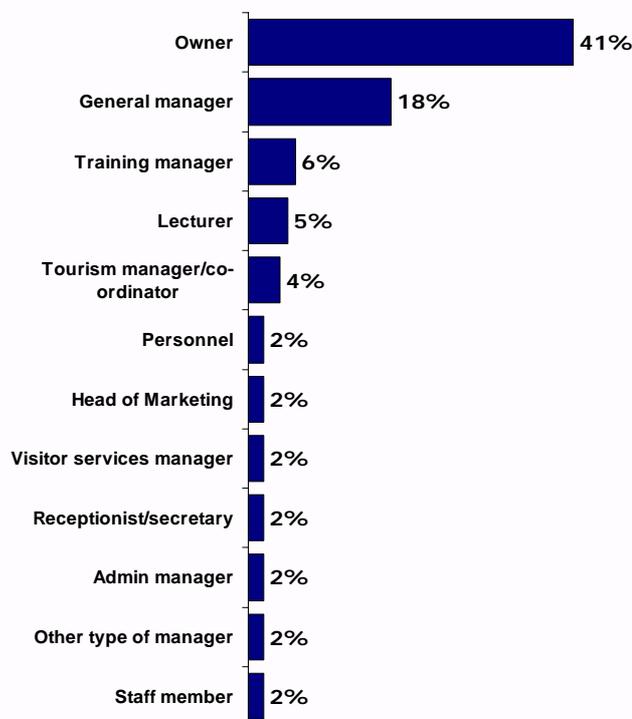
*Heart of England* – Shropshire (17%), Staffordshire (15%), the West Midlands (13%), Derbyshire (9%) and Worcestershire (9%) were the most popular counties in this region.

*North West* – Lancashire was by far the main source of respondents from the North West (76%). A further 13% were from Cheshire.

The depth interviews were also spread across all regions, with at least one consultation undertaken in each area.

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## Position in Organisation



Base: All respondents (N=944)

TNS Travel & Tourism

### *England overall*

Approximately two-fifths of respondents, and the largest proportion completing the questionnaire, were the owners of the business (41%). This is encouraging as owners of the business are perhaps most likely to be able to comment on the full impacts of participation on the business. A further 18% indicated they were the general manager. Most of the remaining respondents were another type of manager within the organisation e.g. training, tourism, visitor services or administration manager. The job title of respondents is likely to be reflective of the size of businesses (as detailed in the next section), with the majority of businesses relatively small in terms of the number of staff employed.

In terms of regions, respondents in the South West and Yorkshire were most likely to be the owners of the business – 77% in each area compared to only 2% of respondents in London and 12% in the East of England. These differences are likely to be accounted for by the presence of different types of businesses in each area. For example, the South West and Yorkshire regions have an above average proportion of accommodation establishments where respondents were most likely to be the owners of the business. To illustrate this

point, hotels with less than 15 employees (94%), guest houses and bed and breakfasts (96%) and self catering establishments (88%) had very high levels of owners of the business completing the survey.

### **Key points**

**The majority of respondents completing the questionnaire were the owners of the business (41%). A further 18% indicated they were the general manager. Most of the remaining respondents were another type of manager within the organisation e.g. training, tourism, visitor services or administration manager.**

#### *Booster areas*

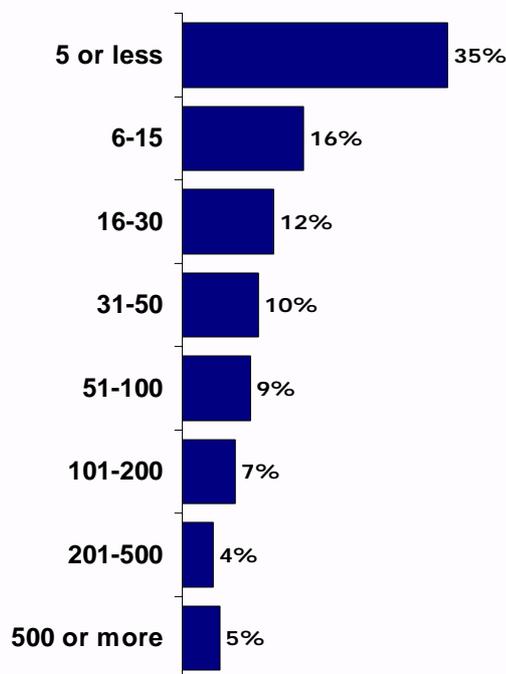
*South East and Dorset* – 31% were owners of the business, 17% were the general manager and a further 6% were the tourism manager/co-ordinator.

*Heart of England* – Just over a third were the owners of the business (35%), 23% were the general manager, 5% were head of marketing and the same proportion were the tourism manager or co-ordinator.

*North West* – Less than half the sample were owners of the business (45%), 14% were the general manager and 8% were the tourism manager or co-ordinator.

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## Size of Business (no. of employees)



Base: All respondents (N=944)

TNS Travel & Tourism

### *England overall*

Half of all businesses in the sample were relatively small, employing 15 or fewer staff (51%). Almost a third had 16-100 employees (31%) and the remaining 16% employed 100 or more staff.

Not surprisingly, there were considerable differences by the regions. The North West (47%), South West (55%), and Yorkshire (63%) had significantly higher than average proportions of businesses with 5 or fewer employees. In contrast, businesses in London and the East of England tended to be larger in scale - 46% of businesses in London and 29% in the East of England had 100 or more employees. In the case of London, this is likely to be accounted for by the fact that this area had a higher than average proportion of education establishments.

There was also significant variation in the number of employees by type of business. Guest houses and bed and breakfasts (87%) and self catering establishments (88%) were most likely to have 5 or fewer employees. Education establishments were the largest - two-fifths of them had more than 200 staff (40%). Participants of the Welcome E-business course in

the last three years were the smallest across all courses with over half of them employing 5 or fewer staff (54%).

### **Key points**

**Half of all businesses in the sample were relatively small, employing 15 or fewer staff (51%). Almost a third had 16-100 employees (31%) and the remaining 16% employed 100 or more staff.**

#### *Booster areas*

*South East and Dorset* – 42% of businesses in the sample had 15 or fewer employees, around a third had 16-100 employees (32%) and 21% employed more than 100 staff.

*Heart of England* – Over half had 15 or fewer employees (55%), 28% employed 16-100 staff and 15% had more than 100 employees.

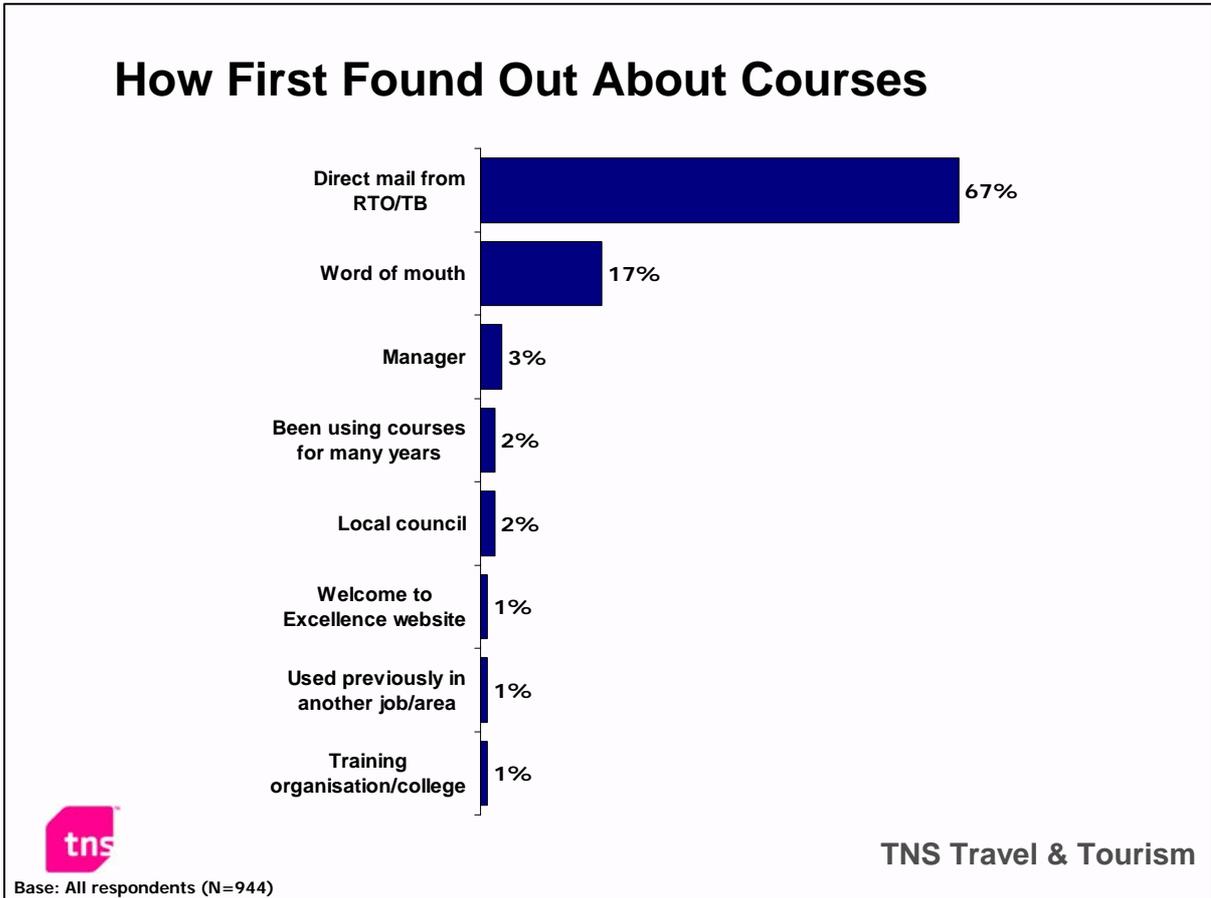
*North West* – 63% of businesses in the North West employed less than 15 staff, 21% had 16-100 staff and 13% were large businesses employing more than 100 staff.

Approximately half of the organisations in the consultations had 50 or less employees. Some of the accommodation establishments and leisure facilities tended to have a core of full-time employees throughout the year and recruit a significant number of seasonal staff during the summer period. The education establishments and local authorities were very large employers each with several hundred employees.

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## Information Sources

All respondents were then asked how they first found out about the Welcome to Excellence training courses and if they had ever received any information on the courses.



### England overall

The vast majority of businesses first found out about the Welcome to Excellence training courses through direct mail from their Regional Tourism Organisation or Tourist Board (67%). Word of mouth recommendation was the only other information source mentioned by more than 3% of respondents. Only 1% of respondents cited the Welcome to Excellence website as the source they used to first find out about the training courses.

Direct mail from the regional tourism organisations was more influential amongst the following segments: those in Cumbria (85%), Yorkshire (84%), guest houses and bed and breakfasts (80%), self catering establishments (82%) and TICs, local authorities and chambers of commerce (78%) and those who had participated in the Welcome Management (79%), Welcome International (78%) and Welcome E-business course in the last three years (79%).

Word of mouth recommendation was more important than average amongst businesses in London (41%), East of England (38%) and education establishments (40%).

When asked if they had ever received any information on the Welcome to Excellence training courses, 82% indicated they had. This proportion was higher than average amongst the following groups: those in the North West (93%), Cumbria (89%), self catering establishments (90%) and TICs, local authorities and chambers of commerce (92%).

### **Key points**

**The largest proportion of businesses first found out about the Welcome to Excellence training courses through direct mail from their regional tourism organisation or tourist board (67%). Over 8 in 10 respondents claimed they had received information on Welcome to Excellence training courses.**

#### *Booster areas*

*South East and Dorset* - 59% first found out about the courses from direct mail from Tourism South East and 23% stated it was a word of mouth recommendation. 85% of respondents indicated they had received information about the courses.

*Heart of England* – Around three-quarters of respondents cited direct mail from Visit Heart of England (74%) compared to only 11% who first found out from word of mouth recommendation. Three-quarters of businesses in this area had received information about the courses.

*North West* – The results were similar to the Heart of England with 72% mentioning the regional tourism organisation and 12% initially finding out through word of mouth. Over 9 in 10 respondents in the North West had received information about the Welcome to Excellence training courses (93%).

The above results were confirmed by the depth interviews with most respondents stating they first heard about the Welcome to Excellence courses from their regional tourism organisation. A significant proportion of the respondents also appeared to be on a mailing list whereby they received regular leaflets and updates on the Welcome to Excellence courses from their regional tourism organisation. At this stage in the discussions it was highlighted that the information received while attending a course including delegate packs and personal contact from other delegates on the course was regarded as an invaluable way of obtaining information and feedback on other Welcome to Excellence courses.

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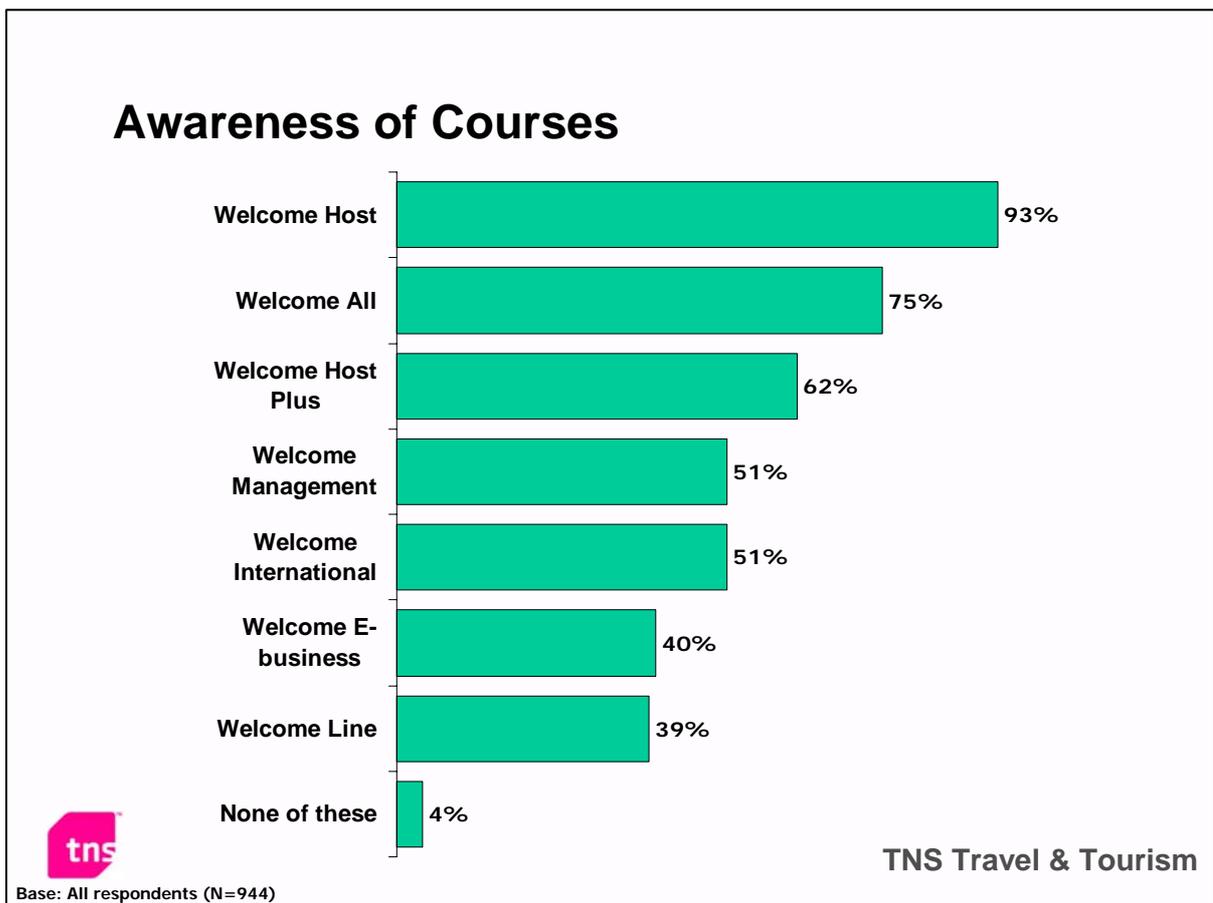
Respondents in the consultations were further asked if they were familiar with the Welcome to Excellence website. Although the majority of respondents were aware of it and had been on the website, very few tended to be regular users of it and were therefore unfamiliar with the details of it:

*I've looked at it. I've not used it extensively but I know it exists.*

*Yes, I think I have been on the website.*

## Awareness and Participation

In order to establish levels of awareness and participation in each of the Welcome to Excellence courses, respondents were asked which of the courses they were *aware of*, which they had *participated in the last three years* and which they had *ever participated in*.



### England overall

More than 9 in 10 respondents were aware of the Welcome Host course illustrating very high levels of awareness with this course (93%). Three-quarters of respondents were aware of Welcome All (75%) and less than two-thirds of the sample indicated they were aware of Welcome Host Plus (62%). Approximately half of respondents were aware of Welcome Management and Welcome International (51%). Lowest awareness levels were recorded for Welcome E-business (40%) and Welcome Line (39%).

Further analysis of the data reveals there were some interesting differences in the awareness levels of the top three courses.

*Welcome Host* – higher levels of awareness were recorded for those in East of England (98%), South East (98%), North West (97%) and Cumbria (97%). In terms of types of businesses, higher levels were recorded for TICs, local authorities and chambers of commerce (98%), education establishments (98%), visitor attractions & museums (95%) and hotels with more than 15 employees (97%).

*Welcome All* – above average levels of awareness were recorded in the North West (83%), Cumbria (84%), the South East (78%), TICs, local authorities and chambers of commerce (93%) and holiday parks and youth hostels (89%).

*Welcome Host Plus* – In terms of regions, the North West (80%) and Cumbria (76%) recorded significantly higher levels of awareness. TICs, local authorities and chambers of commerce (77%) and education establishments (74%) also had above average awareness levels.

### **Key points**

**The vast majority of respondents were aware of Welcome Host (93%). Lowest levels of awareness were recorded for Welcome E-business (40%) and Welcome Line (39%).**

#### *Booster areas*

*South East and Dorset* – Awareness levels for each of the courses were as follows: Welcome Host (98%), Welcome All (78%), Welcome Host Plus (68%), Welcome Management (60%), Welcome International (58%), Welcome E-business (51%) and Welcome Line (48%).

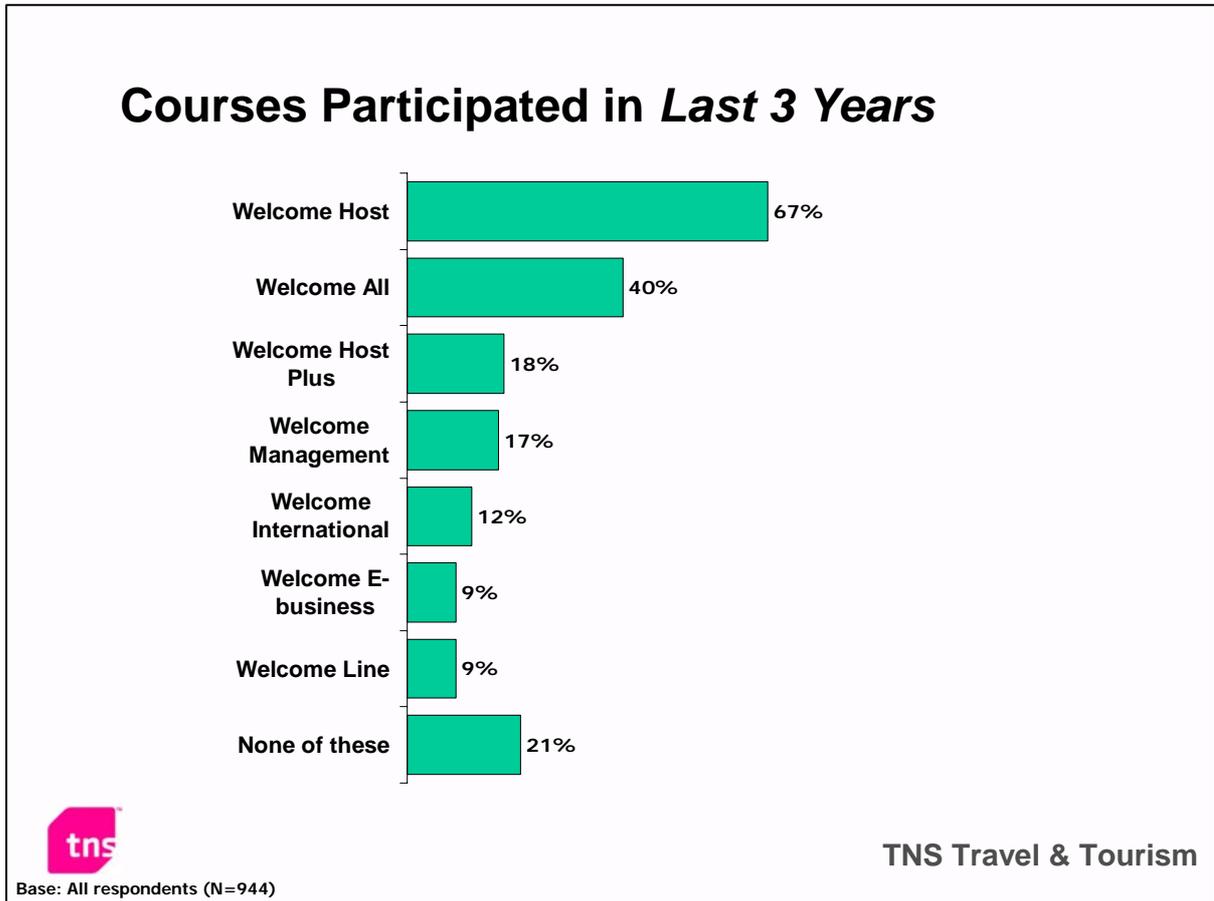
*Heart of England* – Once again, Welcome Host recorded the highest awareness levels although lower than average (88%). Awareness levels for the other courses were as follows: Welcome All (69%), Welcome Host Plus (47%), Welcome Management (44%), Welcome International (39%), Welcome E-business (37%) and Welcome Line (32%).

*North West* – Welcome Host (97%), Welcome All (83%), Welcome Host Plus (80%), Welcome International (70%), Welcome Management (64%), Welcome E-business (59%) and Welcome Line (56%).

Not surprisingly, as all respondents in the depths were participants in at least one Welcome to Excellence course, they recorded higher awareness levels of the courses compared to those in the self-completion survey. Indeed, quite a few respondents had unprompted

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awareness of all 7 courses. Lower levels of awareness were evident for Welcome E-business and Welcome Line.



#### *England overall*

Reflecting the findings on awareness levels, Welcome Host was by some considerable margin the most popular course which respondents (and/or their staff) had participated in the last three years (67%). Two-fifths of respondents had participated in Welcome All (40%). All the other courses had participation levels of less than 20%.

Respondents in the South East (74%), the North West (74%), the East of England (76%), London (80%), hotels (74%), education establishments (80%) and TICs, local authorities and chambers of commerce (75%) were more likely than average to participate in *Welcome Host* in the last three years. *Welcome All* was more popular in the South East (50%), Cumbria (47%), the North East (54%) and amongst TICs, local authorities and chambers of commerce (60%) and holiday parks and youth hostels (66%). Welcome E-business recorded significantly higher participation levels amongst those in the East of England

(22%), while Welcome International and Welcome Management were more popular in Cumbria – 25% and 27% respectively.

One in five respondents claimed they had not participated in any of these courses in the last three years (21%). This proportion increased to 51% in Yorkshire and 38% in the Heart of England compared to 7% in London and 10% in the South East.

### **Key points**

**Consistent with the findings on awareness levels, Welcome Host was by some considerable margin the most popular course which respondents (and/or their staff) had participated in the last three years (67%). One in five respondents claimed they had not participated in any of these courses in the last three years (21%) although there were significant variations by region.**

#### *Booster areas*

*South East* and Dorset – 74% had participated in Welcome Host in the South East followed by 50% who had participated in Welcome All. An above average proportion of respondents participated in most courses in this area with only 1 in 10 respondents not participating in any courses.

*Heart of England*- Lower levels of participation were evident in this region with 50% participating in Welcome Host and 37% participating in Welcome All. Almost two-fifths of respondents in the Heart of England did not participate in any course.

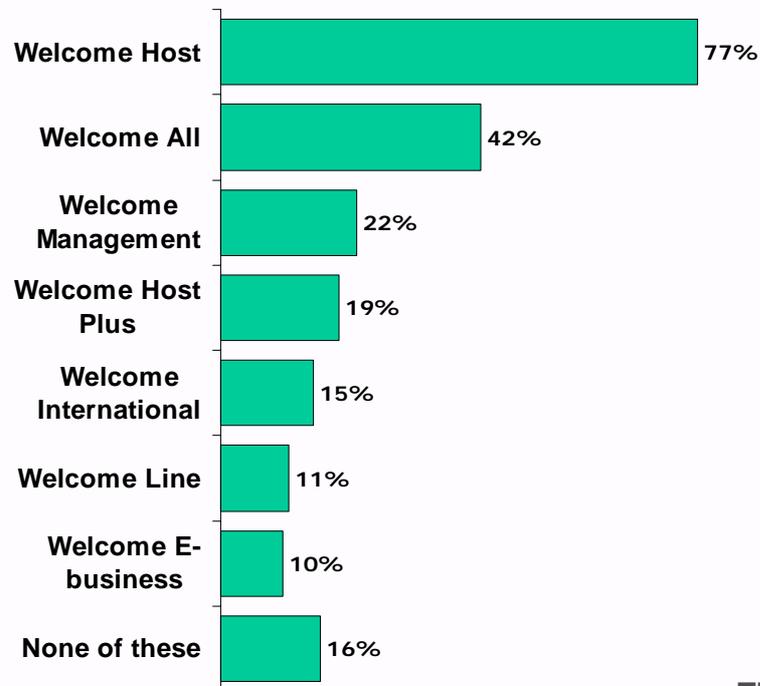
*North West*- Again, the majority of respondents had participated in Welcome Host (74%) and over a third had completed Welcome All courses (35%).

In particular Welcome Host, but also Welcome All were by far the most popular courses which were used by respondents in the depth interviews over the last three years. For some organisations, these Welcome to Excellence courses were an integral component of their induction training for new members of staff. The actual number of staff attending the courses varied across the organisations and was often dependent on the number of new recruits in the company.

*Welcome Host is part and parcel of our training programme*

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## Courses *Ever* Participated In



Base: All respondents (N=944)

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### *England overall*

Not surprisingly, when respondents were asked to identify the Welcome to Excellence courses they had ever participated in, the results were consistent with but slightly higher than the findings on the courses participated in the last three years. Just over three-quarters of respondents had ever participated in Welcome Host (77%) and two-fifths had participated in Welcome All (42%).

Approximately 1 in 6 respondents had never participated in any of the courses (16%). Once again, respondents in the Heart of England (30%) and Yorkshire (33%) were least likely to participate in any of these courses.

### **Key points**

**Welcome Host was once again the most commonly mentioned Welcome to Excellence course which respondents had ever participated in (77%).**

*Booster areas*

*South East* and Dorset – 84% had participated in Welcome Host and 52% had participated in Welcome All. Participation levels for the other courses were as follows: Welcome Management (29%), Welcome Host Plus (25%), Welcome International (19%), Welcome Line (13%) and Welcome E-business (10%). Only 6% had not participated in any of these courses.

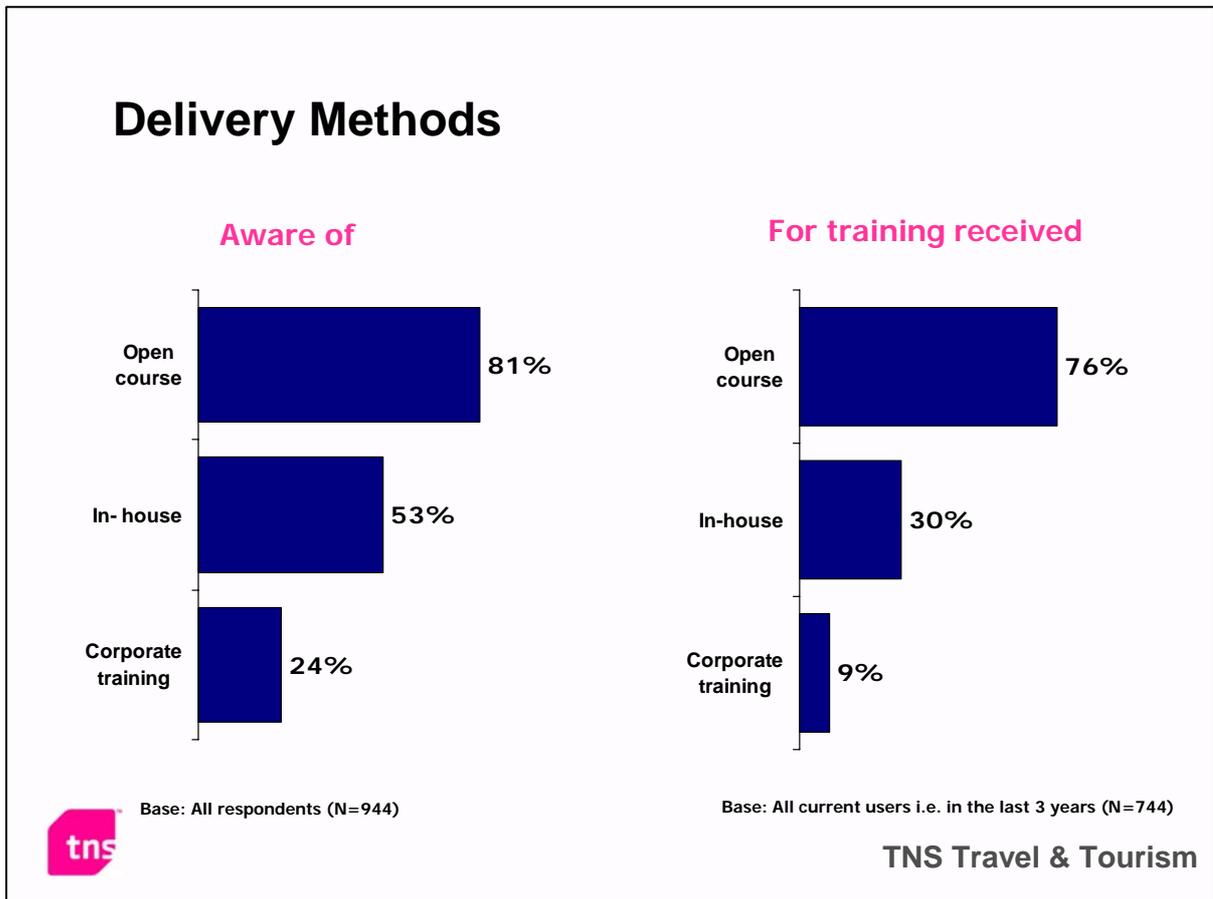
*Heart of England* – The highest levels of participation were recorded for Welcome Host (62%) and Welcome All (41%). Participation levels for the other courses were as follows: Welcome Management (24%), Welcome Host Plus (12%), Welcome International (13%), Welcome E-business (13%), and Welcome Line (11%). 30% had not participated in any of these courses.

*North West* – 84% had ever participated in Welcome Host. The results for the other courses were as follows: Welcome All (38%), Welcome Management (21%), Welcome Host Plus (21%), Welcome International (17%), Welcome E-business (14%) and Welcome Line (10%). 11% had not participated in any of these courses.

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## Delivery Methods

The next two questions in the survey focused on awareness levels of the different types of delivery methods available and also the methods used.



### England overall

As highlighted above, open courses, whereby individual staff attend courses in their regional area recorded the highest levels of awareness (81%) amongst all respondents. Next most popular was in-house training, cited by just over half of respondents (53%). Around a quarter of respondents were aware of corporate training (24%). Not surprisingly, awareness levels were significantly higher amongst those who had participated in at least one course in the last three years. For example, 86% of those who had participated in a course in the last three years were aware of an open course compared to 58% who had never participated in any courses.

Those respondents who had participated in at least one Welcome to Excellence course in the last three years were then asked which delivery methods they had used. The results for the use of open courses were very similar to levels of awareness with around three-

quarters of respondents receiving training using this method (76%). However, the proportion of respondents that had used in-house training (30%) and corporate training (9%) were significantly lower and indeed lower than the levels of awareness recorded in the previous question. These results would suggest that increased promotion of these delivery methods may increase usage levels of these types of delivery methods.

Open courses were most popular in the South West (91%) and Cumbria (87%). In-house training was a particularly popular type of delivery method in the East of England (58%) and London (62%). Corporate training was more frequently used in London (28%). These results are also likely to reflect the types of businesses responding in each area e.g. education establishments in London.

In terms of type of business, hotels with 15 or fewer employees (87%), guest houses and bed and breakfasts (95%), self catering establishments (89%), TICs, local authorities or chambers of commerce (87%) were more likely than average to use open courses. On the other hand, visitor attractions and museums (46%), education establishments (49%) and hotels with more than 15 employees (40%) were more likely than average to use in-house training courses. Education establishments and visitor attractions and museums were most likely to use corporate training courses – 16% and 14% respectively.

### **Key points**

**Open courses were the most popular type of delivery method both in terms of awareness levels (81%) and method used most often (76%). Significantly lower levels of awareness and usage were recorded for in-house and corporate delivery methods, suggesting an opportunity for increased promotion of these methods.**

#### *Booster areas*

*South East and Dorset* – Awareness levels were 83% for open courses, 60% for in-house courses and 31% for corporate training. Actual usage levels were 76%, 34% and 13% respectively.

*Heart of England* – Awareness levels were 78% for open courses, 43% for in-house courses and 16% for corporate training. Usage levels were 81%, 24% and 4% respectively.

*North West* - Awareness levels were 90% for open courses, 58% for in-house courses and 31% for corporate training. Usage levels were 83%, 22% and 6% respectively.

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These findings were also supported by the depth interviews where the open delivery method was by some considerable distance the most frequently used. The benefits of this approach in terms of giving staff the opportunity to meet and network with staff from other organisations was also highlighted by some at this stage.

*We normally go the venue where the course is held.....An important reason for this is for them to meet other people from different parts of the tourism industry*

On the other hand, the convenience of running training on the premises was also widely recognised as a significant advantage, amongst both users and non-users of this delivery method.

*We went to Great Yarmouth to do the course but it would be much easier if it was on-site*

*A lot of our people don't like to travel much so we like to make the courses as accessible as possible*

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## Reasons for Participation

Those respondents who had participated in at least one Welcome to Excellence course in the last three years (N=744)<sup>2</sup> i.e. current users, were asked both unprompted and prompted about their reasons for participation.

### Main Reasons for Participating

- Improvement and development of staff (31%)
- Improvement of customer service/care (30%)
- Industry standard (8%)
- Awareness of needs of disabled (6%)
- Confidence to deal with disabled (6%)
- Keep up to date with customer service (5%)
- To train students (5%)
- Always keen to improve business (4%)
- To give staff a relevant qualification (4%)
- Improved customer care training (4%)



Base: All current users i.e. in the last 3 years (N=744)

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### *England overall*

Clearly there were two key reasons identified, each mentioned by 3 in 10 respondents – to improve and develop staff (31%) and to improve customer service (30%). A further 1 in 12 respondents mentioned the fact that Welcome to Excellence courses were a recognised industry standard as a key reason for participation (8%). All of the other responses were cited by fewer than 7% of respondents.

*Improved development of staff* was most important amongst those who had participated in Welcome Line (41%) and Welcome International (32%) in the last three years.

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<sup>2</sup> N= number of respondents in the sample.

*Improved customer service* was more important amongst those who had participated in Welcome Line in the last three years – 40% compared to only 21% who had undertaken Welcome E-business.

### **Key points**

**The two primary reasons for participating in the Welcome to Excellence training courses were to improve and develop staff (31%) and to improve the level of customer service provided (30%).**

#### *Booster areas*

*South East and Dorset* – To improve and develop staff (32%), to improve customer service (26%) and because it is the industry standard (14%) were the most popular reasons cited for participation.

*Heart of England* - The main reasons in this region were to improve and develop staff (33%), to improve customer service (30%) and to be made aware of the needs of the disabled (11%).

*North West* – To improve customer service (31%) and to improve and develop staff (29%) were again the primary reasons for participating amongst respondents in the North West.

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## Importance in Decision to Participate

	<u>Very important</u>	<u>Quite important</u>	<u>Neither</u>	<u>Not very important</u>	<u>Not at all important</u>	<u>Mean score</u>
● To help increase business performance	61%	30%	5%	2%	2%	4.47
● To enhance individual skills	80%	18%	1%	*	*	4.78
● To increase sales /turnover/ profitability	38%	39%	13%	7%	4%	4.02
● To attract and retain customers	68%	23%	5%	2%	2%	4.55
● To gain a competitive or marketing advantage	32%	33%	19%	11%	5%	3.78
● To provide high standards of customer service	88%	10%	1%	*	1%	4.84



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Base: All current users answering the question (N=676)

### *England overall*

Those respondents who had participated in any of the Welcome to Excellence courses in the last three years were then presented with a list of 6 potential reasons for participation and asked to indicate how important each one was in their decision to participate. Responses were given on a 5-point scale from 'very important' to 'not at all important'. To facilitate comparison of the results, each response was given a score of 5 to 1 whereby 'very important'=5 and 'not at all important'=1 and the mean score was calculated for each. In general, a score of 4 or more is very positive. It should be noted that those respondents who did not answer each question were excluded from the analysis.

In accordance with the findings in the open ended question about reasons for participating, to provide high standards of customer service and to enhance individual skills were the most important reasons for participating. In each case, at least 8 in 10 respondents stated these reasons were 'very important' in their decision to participate – 88% and 80% respectively. Reflecting these results, the average scores were very high at 4.84 and 4.78 respectively. Also relatively important in the decision to participate was to attract and retain

customers and to help increase business performance with each recording an overall mean score of around 4.5.

Considerably less important was to gain a competitive or marketing advantage which was the only reason which recorded an average mean score of less than 4 (3.78).

### **Key points**

**Consistent with the previous findings, to provide high standards of customer service and to enhance individual skills were the two most important reasons for participating in the course(s) with at least 8 in 10 respondents stating these reasons were 'very important' in their decision to participate (88% and 80% respectively).**

#### *Booster areas*

*South East and Dorset* – To provide high standards of customer service (4.84) and to enhance individual skills (4.82) were also the most important reasons given.

*Heart of England* - To provide high standards of customer service (4.89) and to enhance individual skills (4.75) were the most important reasons cited.

*North West* – Similar to above, to provide high standards of customer service (4.85) and to enhance individual skills (4.78) were the key reasons for participation.

In the depth interviews, the provision of high standards of customer service and developing staff skills were also recognised to be the primary reasons for participating in the Welcome to Excellence courses. It was once again apparent that several companies used the courses as an integral component of their induction programme for all new members of staff. The fact that all participants had achieved something and were officially accredited was also significant in the decision to participate.

*To develop customer care skills .....and raising self-confidence.*

*In an increasingly competitive environment staff understand what quality service is.....*

*It gives an all round better impression of us to our customers.*

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*Our new members of staff go on the course....it helps them with customer service.....they get a professional qualification as well*

*It's an official training support mechanism....and it compliments what we do in-house*

In many instances it was accepted that participation in the Welcome to Excellence courses helped increase businesses performance and to attract and retain staff and customers, these were typically seen to be secondary in their importance with regard to reasons for participation. Most respondents were of the opinion that participation did have an impact on these areas of the business, however they were more likely to be indirect benefits of participation and extremely difficult to attribute directly to participation in the courses.

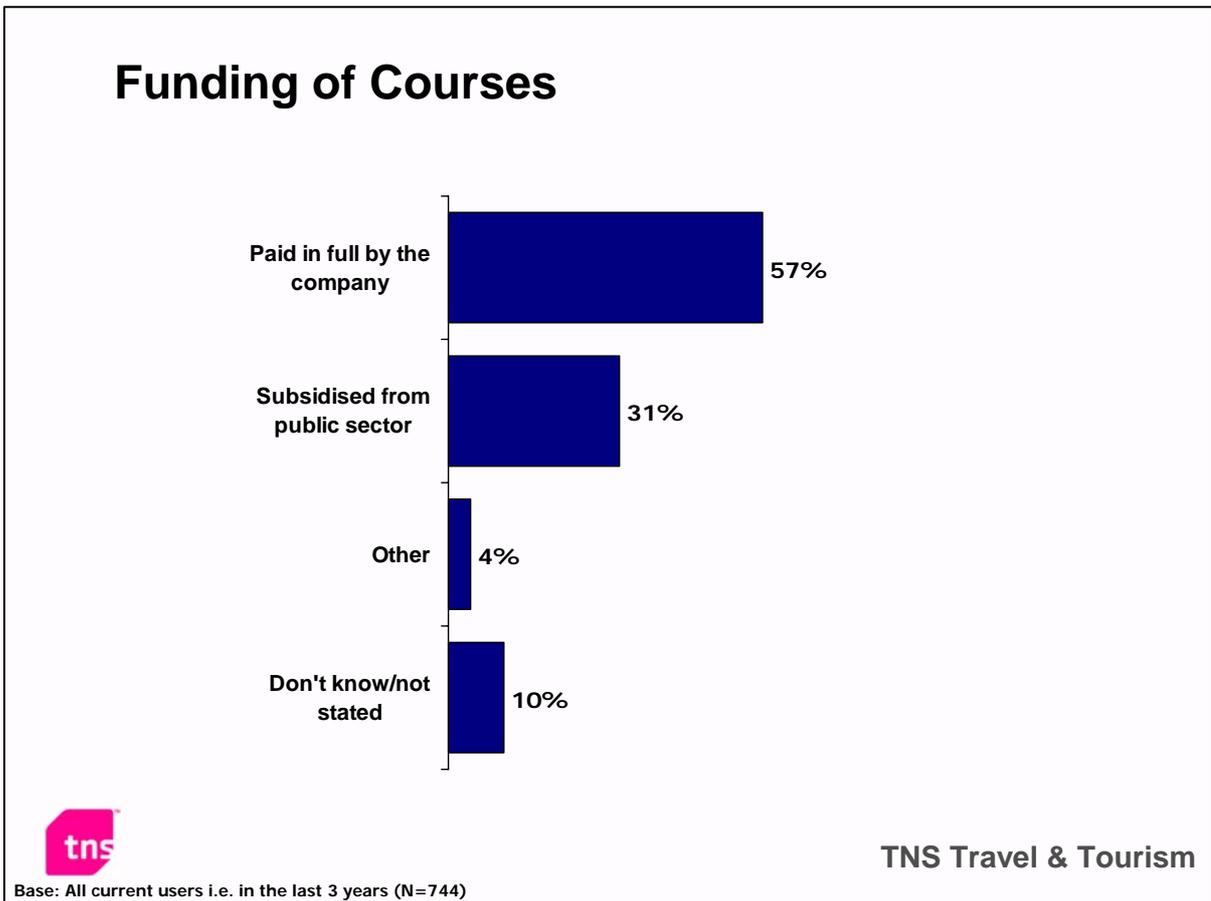
Significantly less important to respondents was obtaining any form of marketing advantage through use of the Welcome to Excellence logo. Although the logo was accepted by much of the trade, it was not seen to be familiar amongst their customers, particularly since it had changed in recent years. On this basis, it was commented by a few respondents that it could be beneficial to raise awareness of the new logo. However, as most respondents had never used the logo for this purpose they were unsure as to the precise benefits of it.

*I had not really thought about it but I don't think people are aware of the logo*

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## Funding

All users of the courses in the last three years were also asked how they funded these courses.



### *England overall*

For over half the sample, the Welcome to Excellence training was paid in full by the company (57%). These results should be treated with some degree of caution as providers such as the regional tourism organisations are in receipt of block grants which enable them to advertise pricing schemes discounted from the full commercial rate.

Less than a third of respondents stated their training was subsidised from the public sector (31%). These respondents were also asked to specify the type of public sector funding they had received. 11% did not give further details of the type of funding. However, the most popular types were from: the local tourist board (10%), the local authority/council (3%), European funding (2%) and colleges (2%).

Organisations in Cumbria (67%) and East of England (67%) were most likely to fund the training themselves. In contrast, businesses in the Heart of England (36%) and the South West (44%) were more likely than average to receive public sector funding.

### **Key points**

**For the largest proportion of the sample, their Welcome to Excellence training was paid for in full by the company (57%). Less than a third of respondents received subsidies from the public sector (31%).**

#### *Booster areas*

*South East and Dorset* – For 52% of respondents in this area, the funding was paid in full by the company. 35% was subsidised from the public sector.

*Heart of England* – 46% claimed the fees for the courses were paid in full by the company and 36% received a subsidy from the public sector.

*North West* – 59% indicated their training was paid in full by the company and 32% said they received public sector funding.

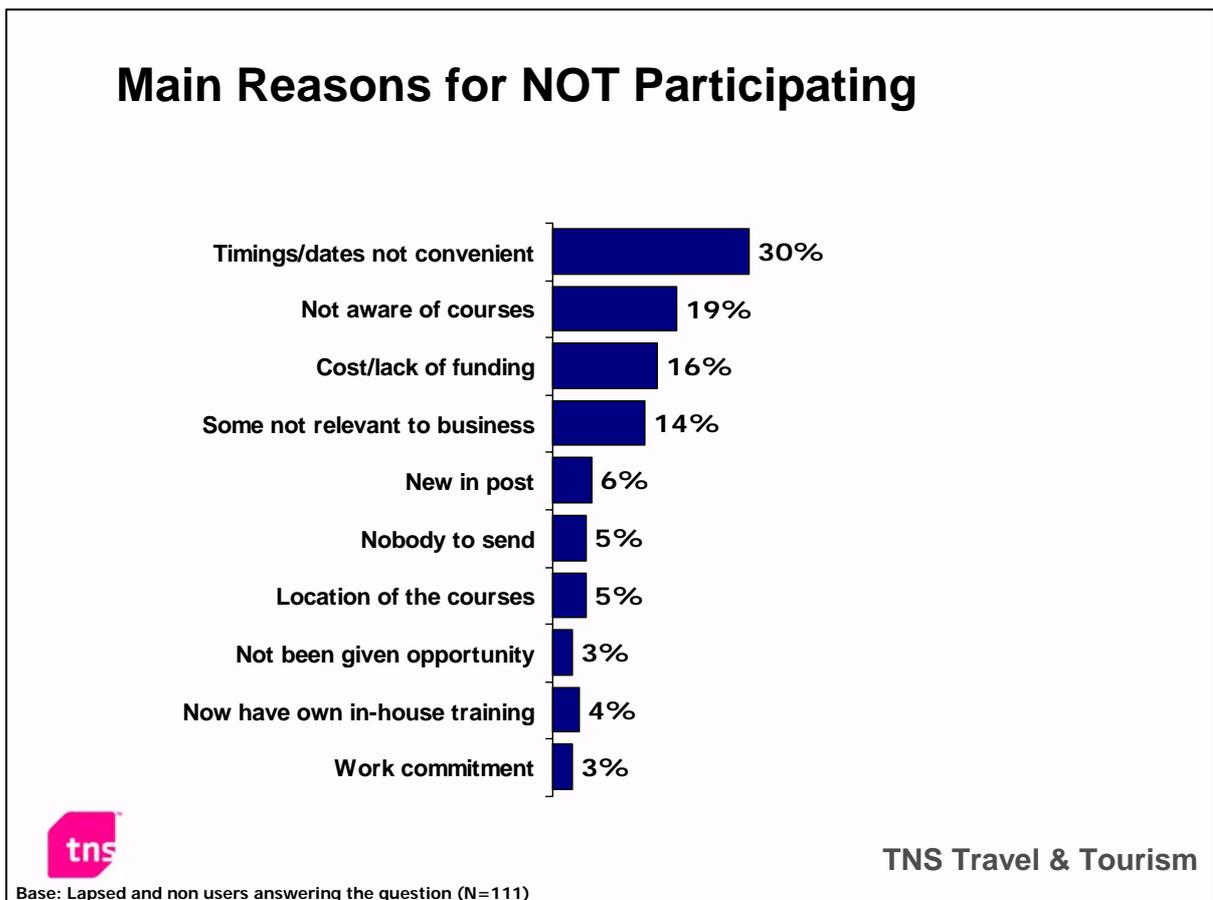
Respondents consulted in the programme of depth interviews were also asked about how they had funded the courses they had undertaken. Typically for most, funding was sourced from their own training budgets. However, if they discovered any other funding sources available they would be most likely to take advantage of this opportunity. Amongst those who used other types of funding, a variety of sources were cited and indeed in many cases the funding was a complicated process, often involving more than one source. The various other sources mentioned included: Regional Development Agencies, the European Social Fund, Learning and Skills Council and the regional tourism organisations.

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## Barriers to Participation

Those respondents in the sample who had never participated in a Welcome to Excellence course or who had not done so in the last three years (N=200) were then asked a series of questions specifically about the barriers to participation.

Due to the relatively small number of respondents answering some of these questions it has not always been possible to provide analysis at the regional level.



### *England overall*

3 in 10 respondents answering the question claimed they had not participated in any Welcome to Excellence training courses recently because the timings and dates were not convenient (30%). Highlighting an opportunity to increase promotion of the some courses, almost 1 in 5 respondents answering the question claimed they didn't participate as they were not aware of the courses (19%). The cost and lack of funding as well as the fact that some courses were not relevant were also significant reasons in the decision not to participate - 16% and 14% respectively. None of the other reasons were mentioned by more than 6% of those answering the question.

It should be noted that due to the relatively large number of respondents not answering this question (N=89) they have been excluded from the results above.

### **Key points**

**The main reason for non-participation in the Welcome to Excellence courses in the last three years was because the dates and timings were not convenient. Almost a third of respondents cited this as a reason for not participating.**

Those respondents interviewed in the consultations were also probed about their reasons for not participating in other Welcome to Excellence courses. Lack of awareness of some courses, particularly Welcome E-business and Welcome Line was a key reason given for non-participation. Also important in the decision not to participate in further courses was the additional costs and funding necessary to take part in more courses.

*Other things are needed first..... spending not yet justified.*

*(Welcome Line)...not sure it justifies the spending.*

Finally, some courses were not regarded as relevant to the business i.e. their content was too basic or not specific enough for staff to benefit from participation. One example of this is in relation to Welcome International course: several of the businesses commented they employed many staff from overseas countries that were fluent in several languages therefore they believed the course would be too basic for them.

*We employ most people for their language ability...they already have these skills therefore the language content would not be in-depth enough for them.*

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## Importance in Decision NOT to Participate

	<u>Very important</u>	<u>Quite important</u>	<u>Neither</u>	<u>Not very important</u>	<u>Not at all important</u>	<u>Mean score</u>
● <b>Costs/too expensive</b>	35%	40%	8%	9%	8%	3.84
● <b>Time constraints</b>	52%	34%	6%	3%	5%	4.24
● <b>Relevance to business</b>	46%	34%	9%	5%	6%	4.10
● <b>Awareness of courses</b>	27%	26%	32%	5%	10%	3.54



Base: Lapsed and non users answering the question (N=87)

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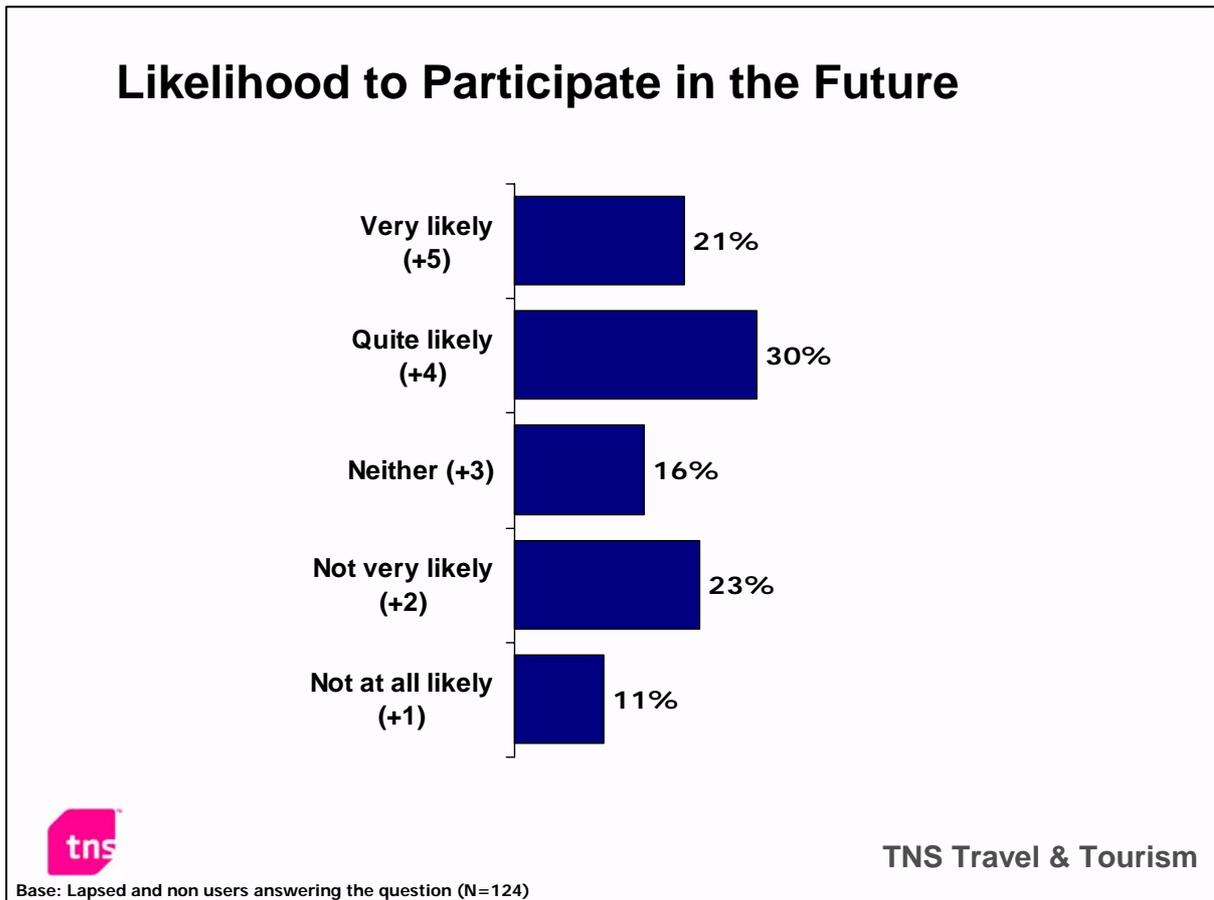
### *England overall*

Those respondents who had not participated in any of the Welcome to Excellence training courses in the last three years (N=200) were then presented with a list of possible reasons for not participating and similar to previously, asked on a 5-point scale to specify the importance of each in the decision not to participate. In order to compare the results, mean scores were calculated for each reason. Those respondents who did not answer the question were excluded from the results. Due to the relatively small sample sizes it is not possible to analyse the results by the key market segments.

86% of respondents were of the opinion that time constraints were important in their decision not to participate making this the most significant reason. The overall mean score was 4.24. Also important was the fact that some courses were seen not be relevant – 80% of respondents cited this as an important reason. The average mean score was also relatively high at 4.10. Slightly less important, although still significant were the costs and lack of awareness of the courses – 75% and 53% respectively were of the opinion these aspects were important in their decision not to participate.

## Key points

Time constraints and the fact the some courses were not relevant to the businesses were the most common prompted reasons for not participating in the Welcome to Excellence courses recently.



### England overall

Lapsed and non-users of the Welcome to Excellence training courses (N=200) were then asked how likely they or their organisation would be to participate in any of the Welcome to Excellence training courses in the future. Amongst those answering the question, approximately half of respondents indicated they would be likely to participate in the future (51%). Around a third said they were not likely to participate (34%) with the remaining 16% neither likely nor unlikely to participate.

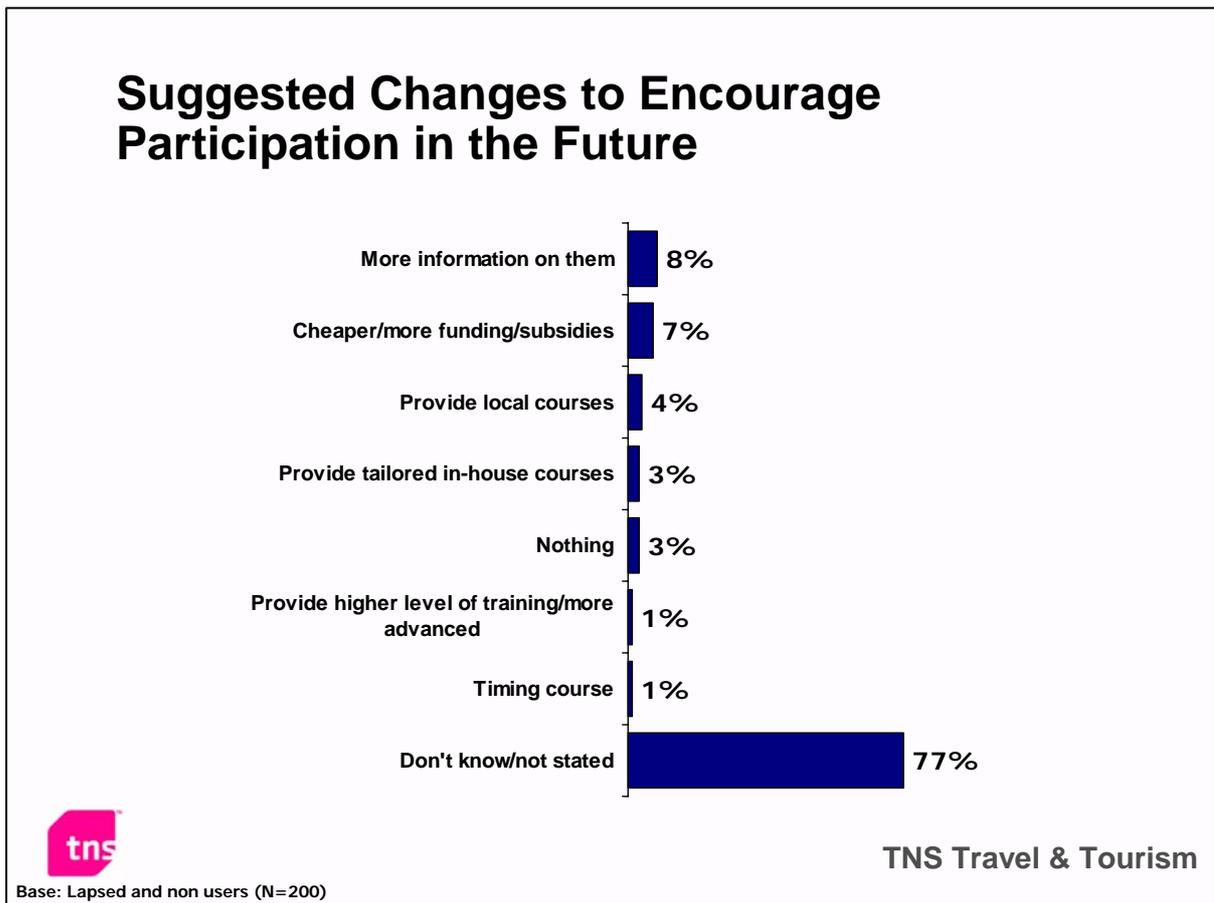
Those respondents who claimed they were not likely to participate in the future were further asked to explain their reasons for this decision. Due to the relatively small number of respondents answering this question (N=38), these results should be interpreted with

caution. Almost half of these respondents stated the reason they were unlikely to participate in the future was that the courses were not relevant (47%). The other answers given were as follows: timings not suitable (16%), only employee/very few staff/can't justify (16%), have our own in-house courses (13%) and lack of funding (11%).

Due to the relatively small sample sizes it is not possible to analyse the results by the key market segments.

### Key points

**Around half of lapsed and non-users of the Welcome to Excellence training courses indicated they would be likely to participate in the future. Amongst those who were unlikely to participate the main reason given was that the courses were not relevant.**



*England overall*

The final questions asked of lapsed and non-users of the Welcome to Excellence training courses was if they could suggest anything that could be done to encourage them to participate in the Welcome to Excellence training courses in the future.

Around three-quarters of respondents evidently were unable to think of anything and did not answer this question (77%). A further 3% stated that there was nothing that could be done. The main reason given was to provide more information on the courses (8%) which would suggest that lack of awareness is an issue for some of these respondents. A similar proportion of respondents claimed that if the courses were cheaper or there was more funding available they might participate in the future (7%). For a further 4% of respondents, the location of the courses was a problem and they indicated that if more local courses were provided they were more likely to participate in the future. None of the other reasons were cited by more than 3% of the sample.

### **Key points**

**When given the opportunity to suggest anything that could be done to encourage lapsed and non-users to participate in the future, the vast majority of respondents could not recommend anything or stated that nothing could be done (80%).**

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## Satisfaction

The next series of questions focused on satisfaction levels with different aspects of each of the Welcome to Excellence courses. It should be noted that only those respondents participating in a course in the last three years was asked to comment on them. Respondents were asked to express their levels of satisfaction with 6 key elements of all the courses on a 5-point scale from 'very satisfied' to 'not at all satisfied'. As before, to facilitate comparison of the results, responses were given a score of 5 (=very satisfied) down to 1 (=not at all satisfied) and mean scores were calculated. A score of above 4 typically represents fairly high levels of satisfaction.

It should be noted that due to the relatively small number of respondents who were able to comment on some courses, it has not always been possible to provide the results at a regional level.

### Levels of Satisfaction – *Welcome Host*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	54%	42%	3%	1%	-	4.48
● Trainer Delivery	58%	38%	2%	2%	*	4.52
● Delivery methods	48%	47%	4%	1%	*	4.39
● Relevance to organisation	53%	42%	4%	1%	*	4.46
● Value for money/costs	49%	41%	8%	1%	1%	4.36
● Quality of materials provided	45%	46%	8%	2%	*	4.34
● OVERALL	52%	42%	4%	2%	*	4.44



Base: All current users of Welcome Host answering the question (N=559)

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### *England overall*

The most commonly mentioned of all the courses was the first to be rated. As shown above, all mean scores were well above 4 which illustrates high levels of satisfaction. For each of the individual aspects rated, at least 90% of respondents indicated they were satisfied with the majority of responses. Furthermore, in most cases the majority of responses were in the more positive rating of 'very satisfied'. The usefulness and content of the course, trainer delivery and relevance to the organisation were the highest rated aspects, each recorded mean scores of around 4.5. Slightly lower scores were recorded for the quality of materials provided (4.34), value for money costs (4.36) and delivery methods (4.39). Encouragingly, a maximum of 2% of respondents indicated they were not satisfied with any aspect. However, these respondents were then asked to give reasons for their dissatisfaction with the course. The main reasons given were that they felt the course should have been more specific (18%), the delivery was boring (14%) and the course was too basic (11%). Due to the relatively small number of respondents answering this question (N=28), these results should be interpreted with caution.

### **Key points**

**Overall, very high levels of satisfaction were expressed for the Welcome Host training course. For all aspects rated, at least 90% of respondents claimed they were satisfied.**

### *Booster areas*

*South East and Dorset* – The mean scores in the South East were as follows: Usefulness and content (4.51), trainer delivery (4.50), delivery methods (4.44), relevance to organisation (4.46), value for money/costs (4.52), quality of materials provided (4.44) and overall (4.44).

*Heart of England* - Usefulness and content (4.38), trainer delivery (4.34), delivery methods (4.26), relevance to organisation (4.40), value for money/costs (4.35), quality of materials provided (4.21) and overall (4.39).

*North West* - Usefulness and content (4.53), trainer delivery (4.59), delivery methods (4.44), relevance to organisation (4.49), value for money/costs (4.42), quality of materials provided (4.35) and overall (4.50).

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## Levels of Satisfaction – *Welcome Host Plus*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	66%	30%	1%	3%	-	4.58
● Trainer Delivery	61%	37%	1%	1%	-	4.57
● Delivery methods	57%	35%	6%	1%	1%	4.45
● Relevance to organisation	61%	34%	2%	1%	1%	4.50
● Value for money/costs	55%	39%	4%	2%	1%	4.46
● Quality of materials provided	54%	40%	5%	1%	1%	4.45
● OVERALL	65%	29%	3%	2%	1%	4.55



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Base: All current users of Welcome Host Plus answering the question (N=142)

### *England overall*

Satisfaction levels for Welcome Host Plus were very high, indeed they were slightly higher than the comparative figures for Welcome Host. Once again, the highest scores were recorded for the usefulness and content of the course and also trainer delivery with at least 96% of respondents stating they were satisfied with each of these aspects. Reflecting these results, the average mean scores for both of these aspects were around 4.6. Similar to Welcome Host, slightly lower scores were recorded for delivery methods (4.45), the quality of the materials provided (4.45) and value for money and costs (4.46). Nevertheless, satisfaction levels with these aspects were still at a high level. A maximum of 3% of respondents were not satisfied with any of the aspects rated.

Only 7 respondents commented on why they were dissatisfied with the Welcome Host Plus course and of these 3 respondents stated it was too basic and a further 3 respondents stating it should have been more specific/relevant to them.

## Key points

Satisfaction levels for Welcome Host Plus were very high, indeed they were slightly higher than those recorded for Welcome Host. Similar to Welcome Host, the highest scores were recorded for the usefulness and content of the course and also trainer delivery, with at least 96% of respondents stating they were satisfied with each of these aspects.

### Levels of Satisfaction – *Welcome All*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	71%	28%	1%	1%	-	4.69
● Trainer Delivery	68%	30%	1%	1%	1%	4.63
● Delivery methods	60%	36%	3%	-	1%	4.55
● Relevance to organisation	64%	33%	3%	*	*	4.60
● Value for money/costs	56%	38%	6%	1%	-	4.48
● Quality of materials provided	53%	42%	4%	1%	-	4.46
● OVERALL	65%	33%	2%	*	*	4.61



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Base: All current users of Welcome All answering the question (N=326)

### *England overall*

Very high levels of satisfaction were expressed with the Welcome All course and in fact they were the highest levels recorded across the suite of Welcome to Excellence courses. Reflecting the findings from both the Welcome Host courses, the usefulness and content and the trainer delivery were the highest rated aspects of the Welcome All course with at least 98% of respondents stating they were satisfied with these aspects. Lower scores were recorded for the quality of materials provided (4.46) and value for money and costs (4.48), although they were still high with at least 94% claiming they were satisfied. As a result of

these very high levels of satisfaction, only a few respondents were able to comment on why they were dissatisfied (N=10) and the majority of these did not provide a reason.

### **Key points**

**The levels of satisfaction recorded for Welcome All were the highest recorded across the suite of Welcome to Excellence training courses.**

#### *Booster areas*

*South East* – The mean scores in the South East were as follows: Usefulness and content (4.71), trainer delivery (4.66), delivery methods (4.59), relevance to organisation (4.63), value for money/costs (4.68), quality of materials provided (4.49) and overall (4.64).

*Heart of England* - Usefulness and content (4.59), trainer delivery (4.52), delivery methods (4.47), relevance to organisation (4.49), value for money/costs (4.33), quality of materials provided (4.27) and overall (4.51).

*North West* - Usefulness and content (4.80), trainer delivery (4.75), delivery methods (4.59), relevance to organisation (4.70), value for money/costs (4.63), quality of materials provided (4.55) and overall (4.65).

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## Levels of Satisfaction – *Welcome E-business*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	39%	52%	6%	3%	-	4.28
● Trainer Delivery	41%	52%	3%	4%	-	4.29
● Delivery methods	39%	52%	5%	3%	2%	4.24
● Relevance to organisation	41%	47%	7%	3%	2%	4.24
● Value for money/costs	58%	31%	8%	-	3%	4.42
● Quality of materials provided	36%	51%	10%	3%	-	4.19
● OVERALL	47%	42%	3%	6%	2%	4.27



TNS Travel & Tourism

Base: All current users of Welcome E-business answering the question (N=69)

### *England overall*

Only a relatively small number of respondents were able to comment on this course reflecting the lower participation levels (N=69). Although all the mean scores recorded were all above 4, which illustrate relatively high levels of satisfaction, the scores were the lowest recorded across all the Welcome to Excellence courses.

In this course, the value for money and cost of the course actually received the highest levels of satisfaction with an overall mean score of 4.42. Notably lower levels of satisfaction were recorded for the quality of materials provided (4.19). Only 8 respondents were able to comment on why they were dissatisfied with the course and 3 respondents stated it should have been more relevant/specific. A further 2 respondents were of the opinion the trainer didn't understand their business and 2 respondents felt the course was too much to take in at one time.

### Key points

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Although still relatively high, the overall levels of satisfaction recorded for Welcome E-business were the lowest across all the Welcome to Excellence training courses, perhaps suggesting an opportunity for some improvements in the offering of this course.

## Levels of Satisfaction – *Welcome International*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	51%	42%	5%	2%	-	4.41
● Trainer Delivery	58%	36%	4%	3%	-	4.49
● Delivery methods	50%	48%	1%	1%	-	4.46
● Relevance to organisation	50%	38%	10%	3%	-	4.35
● Value for money/costs	49%	37%	10%	4%	-	4.32
● Quality of materials provided	55%	35%	8%	3%	-	4.43
● OVERALL	52%	40%	7%	1%	-	4.43



TNS Travel & Tourism

Base: All current users of Welcome International answering the question (N=82)

### *England overall*

Similar to Welcome E-business, due to the lower participation levels in this course a relatively small sample of respondents were able to comment on this course (N=82).

Overall, levels of satisfaction were similar to those expressed for Welcome Host with the majority of mean scores recorded around 4.4. However, in this instance the highest levels of satisfaction were recorded for trainer delivery (4.49) and delivery methods (4.46). The lowest satisfaction levels were recorded for value for money and costs (4.32) and relevance to the organisation (4.35). Only 5 respondents provided reasons as to why they were dissatisfied and of these 3 respondents were of the view that the course should have been more relevant/specific to their business.

## Key points

Typically, the levels of satisfaction for Welcome International were similar to those for Welcome Host, with most mean scores around 4.4.

### Levels of Satisfaction – *Welcome Line*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	49%	49%	2%	-	-	4.47
● Trainer Delivery	52%	45%	-	2%	2%	4.43
● Delivery methods	41%	56%	-	2%	2%	4.32
● Relevance to organisation	59%	40%	2%	-	-	4.57
● Value for money/costs	54%	40%	2%	-	4%	4.42
● Quality of materials provided	55%	38%	7%	-	-	4.47
● OVERALL	46%	50%	2%	2%	-	4.40



Base: All current users of Welcome Line answering the question (N=59)

TNS Travel & Tourism

### *England overall*

Less than 60 respondents were able to comment on the Welcome Line course therefore the results should be interpreted with some degree of caution. The mean score recorded for the course overall was 4.40 which illustrates high levels of satisfaction with this course. Across all aspects rated, at least 93% of respondents were satisfied with the course. The highest levels of satisfaction were recorded for the relevance of Welcome Line to the organisation (4.57). In contrast, the lowest satisfaction score was recorded for the delivery methods (4.32).

## Key points

Although a relatively small number of respondents had participated in Welcome Line, the vast majority of respondents were satisfied with all aspects of the course.

## Levels of Satisfaction – *Welcome Management*

	<u>Very satisfied</u>	<u>Quite satisfied</u>	<u>Neither</u>	<u>Not very satisfied</u>	<u>Not at all satisfied</u>	<u>Mean score</u>
● Usefulness & content	50%	43%	4%	3%	-	4.41
● Trainer Delivery	49%	47%	1%	3%	-	4.42
● Delivery methods	47%	50%	2%	2%	-	4.42
● Relevance to organisation	57%	37%	6%	-	1%	4.48
● Value for money/costs	53%	43%	3%	-	1%	4.48
● Quality of materials provided	51%	43%	7%	-	-	4.44
● OVERALL	53%	43%	3%	2%	-	4.46



TNS Travel & Tourism

Base: All current users of Welcome Management answering the question (N=122)

### *England overall*

Approximately 120 respondents were able to comment on the Welcome Management course.

High levels of satisfaction were expressed with all aspects of the Welcome Management course with more than 9 in 10 respondents stating they were satisfied with each aspect. Interestingly, there were no significant differences in the mean satisfaction scores recorded across the 7 elements of the course rated. Only a very few respondents claimed to be dissatisfied with Welcome Management. Of the 6 respondents who provided reasons for their dissatisfaction, the majority (N=3) were dissatisfied with the relevance of the course.

### **Key points**

**All the mean satisfaction scores recorded for Welcome Management were above 4.4, illustrating high levels of satisfaction with this course.**

Satisfaction levels across all aspects rated in the courses in the consultations were also very high:

*Trainer delivery* – Satisfaction levels for the trainer delivery were all very high with the feedback received from staff who attended the course(s) extremely positive. Trainers were also regarded as knowledgeable and flexible in their delivery of the course.

*Relevance to business (content)* – Again, satisfaction levels were high and several respondents commented that from their experience they found it beneficial to provide their trainers with as much information about the participants and their jobs in advance of the course to enable the trainer to pitch the course at an appropriate level.

*Very relevant... trainers always relate scenarios to the group*

One of the universities consulted did criticise the courses because as they were run by the regional tourism organisation they believed they were more focused on tourism which was less relevant for them. However, during the summer season the university did attract a significant residential conference market which was tourism related.

*Value for money/ costs* – Nearly all respondents were very satisfied with the value for money and cost of the courses, although it was recognised by many that the costs had increased over recent years.

*Excellent value for money, even at full price*

*Quality of materials provided* – Once again, very high levels of satisfaction were expressed with the quality of materials provided in the Welcome to Excellence courses. In particular, the participants' guide or workbooks and the badges were all well received.

*Adapted for all and well produced*

*The workbooks are excellent...people keep them*

*Administration* - In the majority of cases, most of the administration of the courses was undertaken the Regional Tourism organisation which ensured that the administration process was relatively straightforward for participating organisations.

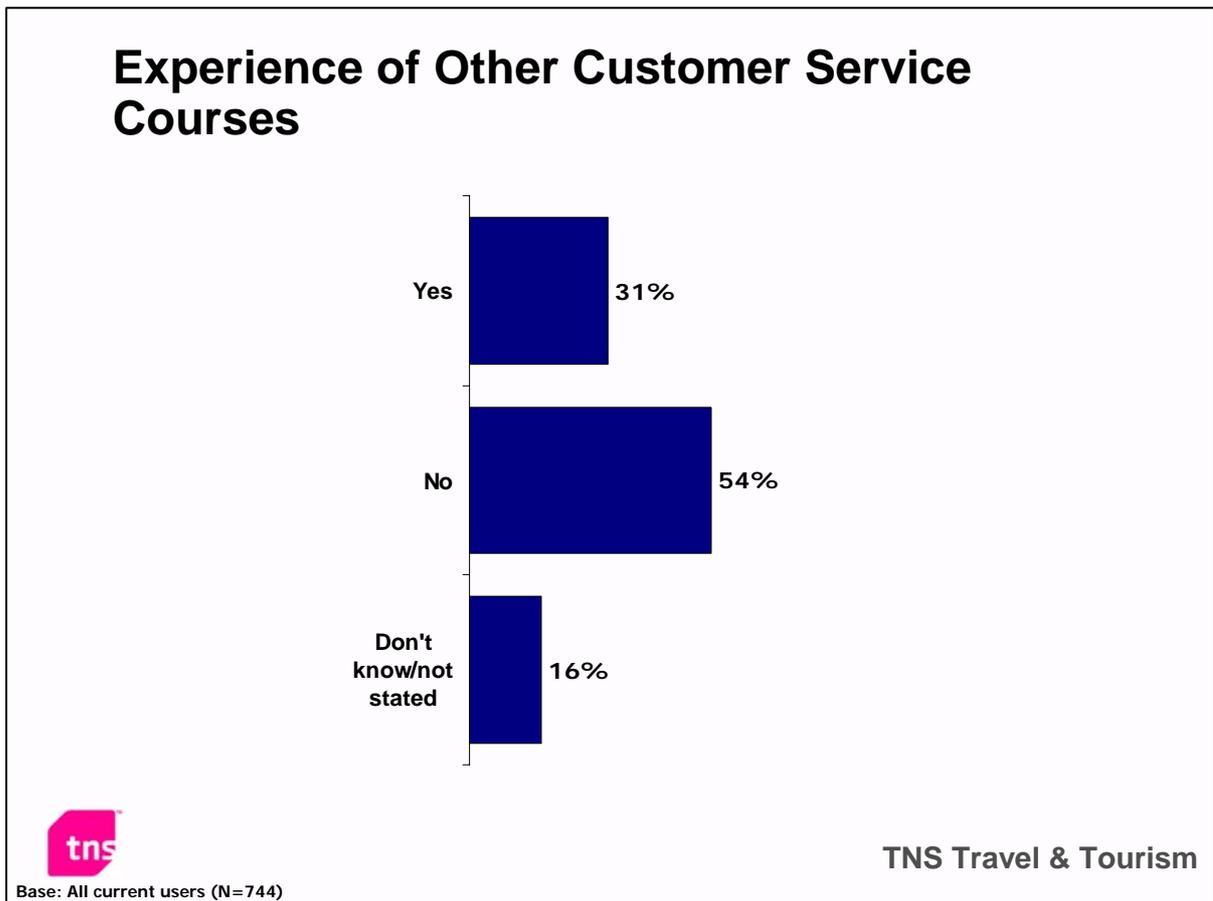
*It would be a pain if I had to do it all but One North East do it...they are spot on*

The fact that the materials were sent out in advance of the course was also appreciated and gave respondents the opportunity to read up on the content of the course in advance.

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## Other Customer Service Courses

'Current users' (in the last three years) of Welcome to Excellence training courses were also asked if they had participated in any other customer service courses and, if so, how they compared to Welcome to Excellence courses.



### England overall

Approximately 3 in 10 current users of Welcome to Excellence training courses indicated they had experience of other types of customer service training programmes (31%). This proportion was highest amongst the following market segments: those in the Heart of England (38%), TICs, local authorities and chambers of commerce (46%), other types of businesses e.g. leisure and retail facilities, hospitality sector (44%), those who used corporate training delivery methods (48%), those who had used Welcome Host Plus (47%) and Welcome International (42%) in the last three years.

These respondents who had experience of other customer service training courses were asked to provide details of these courses. The most frequently cited course, mentioned by a third of respondents was their own company in-house training (33%). Other courses

mentioned included: customer related NVQ (6%), customer complaint handling (5%), business intelligence (4%), health and safety (3%), customer care skills course in college (3%), unspecified customer care courses (3%) and City Council training (2%). It should be highlighted that the business intelligence and health and safety courses suggested are not actually customer service courses.

### **Key points**

**Almost a third of respondents had experience of another customer service course (31%) and the main type of other course undertaken was their own company in-house customer care training course.**

#### *Booster areas*

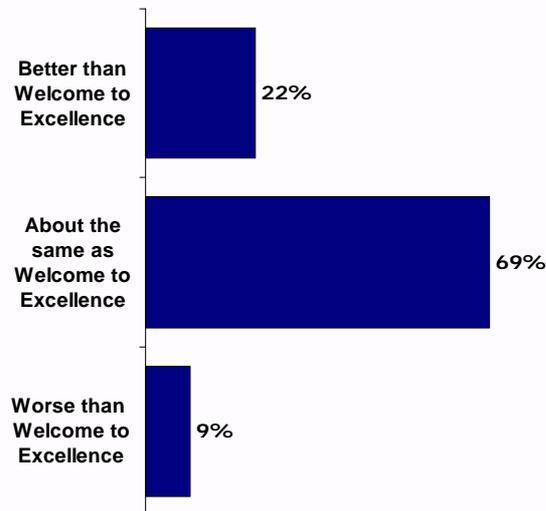
*South East and Dorset* - Just over a third of respondents in this area had experience of another customer service training programme (35%). The most popular type mentioned was their own company in-house customer care training course (45%).

*Heart of England* – 38% of the sample in this region had undertaken another type of customer service course. The most popular types mentioned was their own company in-house customer care training course (34%) and customer complaint handling (10%).

*North West* – 36% of respondent in the North West had experience of similar courses. The most popular type of course mentioned was their own company in-house customer care training course (26%).

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## Other Customer Service Courses Compared to Welcome to Excellence



TNS Travel & Tourism

Base: All current users with experience of other types of customer service training programmes answering the question (N=183)

### *England overall*

All current users of Welcome to Excellence courses (in the last three years), who had experienced other types of customer service training courses were then asked to compare these courses with Welcome to Excellence. Just over a fifth of respondents answering the question were of the opinion that other customer service training courses were better (22%). However, the majority of respondents stated that other courses were comparable to Welcome to Excellence (69%) and 9% believed Welcome to Excellence was better.

It should be noted that without knowing further details of these other courses, it is difficult to make a direct comparison as they may for example be longer courses or specifically tailored to individual business requirements.

Those respondents who were of the opinion other customer service training courses were better or worse than Welcome to Excellence were further asked to explain their reasoning behind this response. First of all, the main reasons given for other courses being better were: they were more focused towards their needs/specific job (29%), they had more depth/advanced training (27%) and excellent trainers from the industry (9%).

On the other hand, the main reasons provided for Welcome to Excellence being a better course were: other courses were not as detailed (13%) and they had too much emphasis on participation and not enough facts (11%).

### **Key points**

**The largest proportion of respondents who had experienced other types of customer service training courses were of the view that these courses were comparable to Welcome to Excellence courses (69%). However, given more than 1 in 5 respondents believed that other courses were better, this would perhaps indicate there is some room for improvement.**

#### *Booster areas*

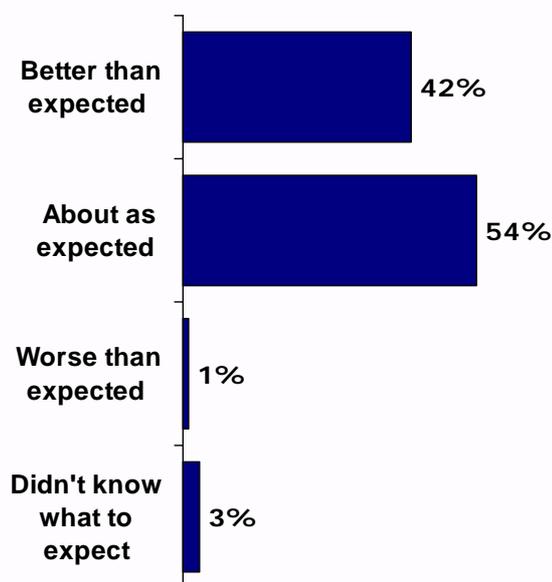
*South East and Dorset* – Only 10% of respondents were of the opinion that other customer service training courses were better than Welcome to Excellence courses. 85% felt they were the same and 5% thought they were worse than Welcome to Excellence courses.

*Heart of England* – One in five respondents thought the other customer service training course(s) they had experienced was better than Welcome to Excellence (21%). 64% thought they were the same and 15% were of the opinion it was worse than Welcome to Excellence.

*North West* – 31% of respondents believed that other customer service course(s) they had undertaken were better than Welcome to Excellence. 64% thought they were the same and only 6% were of the view that other customer service courses were worse than Welcome to Excellence.

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## Overall Rating of Participation



Base: All current users answering the question (N=572)

TNS Travel & Tourism

### *England overall*

Respondents who had used Welcome to Excellence courses in the last three years were then given the opportunity to rate their overall participation in Welcome to Excellence. Encouragingly for over two-fifths of respondents, Welcome to Excellence courses exceeded their expectations. For the largest proportion of respondents, expectations were met by the courses (54%). Only 1% of respondents claimed Welcome to Excellence was worse than expected.

Further analysis of the results reveals that the following market segments were more likely to state that Welcome to Excellence was better than expected: those in the North East (49%) and the South West (48%), hotels (50%), particularly smaller establishments with 15 or less employees (62%) and education establishments (57%). Those organisations where there were notably lower levels of respondents indicating their expectations were exceeded included: respondents in Cumbria (27%), Heart of England (32%) and visitor attractions and museums (32%).

## **Key points**

**Illustrating the high levels of satisfaction experience with the Welcome to Excellence courses, more than two-fifths of respondents stated that the courses were better than they expected (42%).**

### *Booster areas*

*South East and Dorset* - 43% said Welcome to Excellence was better than expected, 54% believed it was as they expected and 1% thought it was worse than expected.

*Heart of England* – Around a third thought it was better than expected (32%), 63% were of the opinion it was about the same as they expected and 3% claimed it was worse than expected.

*North West* – Almost half of respondents stated Welcome to Excellence was better than expected (47%), a similar proportion felt it was as they expected (50%) and 1% thought it was worse than expected.

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## Impacts of Participation

In an attempt to assess how participation in the Welcome to Excellence courses has affected businesses, respondents were presented with a list of 8 business areas and asked to indicate the extent to which participation has impacted on each of these areas. Responses were asked to give their answers on a 5-point scale from 'increased a lot' to 'decreased a lot.' As previously, in order to aid comparison of the results, each response was given a score from 5 (=increased a lot) to 1 (decreased a lot) and mean scores were then calculated.

### Impacts of Participation

	<u>Increased a lot</u>	<u>Increased a little</u>	<u>Stayed the same</u>	<u>Decreased a little</u>	<u>Decreased a lot</u>	<u>Mean score</u>
● Skills of you/your staff/students	37%	57%	6%	-	-	4.30
● Level of new customers	6%	35%	59%	*	-	3.47
● Level of repeat business	11%	39%	50%	1%	-	3.60
● Turnover/sales/profitability	7%	37%	56%	1%	*	3.50
● Recruitment and retention	10%	29%	59%	2%	-	3.48
● Competitive advantage	11%	39%	49%	-	-	3.62
● Marketing Opportunity	12%	41%	46%	1%	-	3.65
● Productivity	11%	41%	48%	-	-	3.63



TNS Travel & Tourism

Base: All current users answering the question (N=629)

### England overall

As illustrated in the table above, by some considerable distance the main benefit of participation were the skills of staff and students with over a third of respondents claiming this had increase a lot (37%) and a further 57% stating it had increased a little. The overall mean score was 4.30 which was the only mean score over 4 across all business areas rated. Although mean scores in the other business areas were notably lower, participation in Welcome to Excellence did impact on each of them with around 40%-50% of

respondents stating that each of these business areas had increased as a result of participation.

Interestingly, small hotels with less than 15 employees were more likely to experience new customers (3.74), repeat business (3.92), increased turnover/sales/profitability (3.71), a competitive advantage (3.89), marketing opportunity (3.87) and increased productivity (3.83) as a result of participation. Education establishments were more likely to experience new customers (3.73) and a marketing opportunity (3.90) as a result of participation.

### **Key points**

**By far the main impact of participation in Welcome to Excellence was on the skills of staff and students.**

#### *Booster areas*

*South East and Dorset* – Consistent with the findings above, the main impact of participation was on the skills of staff and students (4.31).

*Heart of England* – Once again, the largest impact was on the skills of staff and students (4.29).

*North West* – Similar to the other areas the skills of staff and students was the greatest impact on participants (4.37).

From the consultations, the development of staff skills, particularly in relation to increasing their confidence and understanding of customer care was a key benefit of participation in the training course(s). The increased confidence gained from participation in turn enabled staff to provide a higher level of service to customers.

*Staff become more confident in dealing with customers*

*Helps increase their awareness of the importance of customers in the business*

*To be able to say we are trained and therefore professionals*

*A good reminder of what good service actually means*

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It was widely recognised amongst participants that when customers receive a high level of customer service they were more likely to return. Hence, the level of repeat business and profitability was also recognised to increase indirectly as a result of participation.

*Our business as a whole has increased....this must have had an effect but we have no hard evidence*

Another important benefit of the training courses was the fact that it offered a team building opportunity with the opportunity to share issues and understand the roles of other members of staff.

*Gets us working together...breaks down any barriers*

*It has brought the whole team together which is very important as this department was only formed three years ago*

Related to this, some respondents were of the opinion that staff morale and motivation was significantly increased as a result of participation which hopefully encourages staff to stay within the organisation.

*It offers a sense of achievement.*

*It enhances the positive environment we work in.*

The marketing advantage of the Welcome to Excellence training courses was acknowledged to be relatively limited as the brand was thought to have a relatively low profile amongst customers.

*People have to know what it is before there is an advantage.*

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## Other Benefits of Participation

- Opportunity for staff to meet and network with others (36%)
- Give staff more confidence and broaden their knowledge (35%)
- Staff feel valued/motivated (15%)
- To learn about customers with disabilities (13%)
- Students given qualifications valued by potential employers (6%)
- To provide staff with an understanding of the wider market place (4%)



Base: All current users answering the question (N=203)

TNS Travel & Tourism

### *England overall*

Respondents were then given the opportunity to suggest any other benefits of participation from the Welcome to Excellence courses. Amongst those answering the question (N=203), the two main benefits cited were an opportunity for staff to meet and network with others (36%) and to give staff more confidence and broaden their knowledge (35%). The fact that staff feel valued and motivated was also cited as a benefit by around 1 in 7 respondents. Reflecting the relatively high levels of participation in Welcome All, to learn about customers with disabilities was mentioned by around 1 in 8 respondents as another benefit (13%).

### **Key points**

**The opportunity to meet/network with others and to give staff more confidence and broaden their knowledge were the other main benefits of participation.**

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### *Booster areas*

Due to the relatively small sample sizes, these results have not been presented at the regional level.

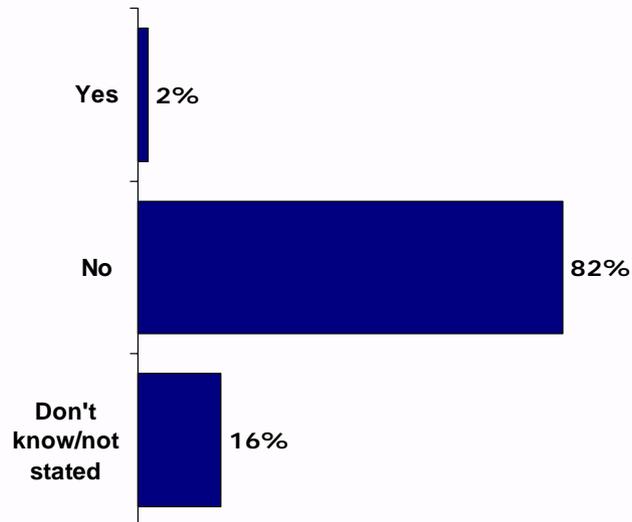
It was evident from the consultations that participation in the Welcome to Excellence course(s) also influenced the operation of businesses, particularly in relation to training strategies. A significant number of respondents were of the opinion that participation in the courses assisted them in the formulation of their training programme and/or enhancement of their existing training methods. As mentioned previously in the report, some of the Welcome to Excellence courses were a key element of their induction programme for new members of staff. A few respondents also commented that participation encouraged them to develop their own in-house training programmes to supplement the Welcome to Excellence suite of courses.

*It has prompted us to develop our own wider customer service strategy....a real focus for customer service and a springboard to do other things*

Enhanced training plans for staff members were also identified as an example of how participation has influenced their training strategies.

For one organisation in particular, involvement in the Welcome to Excellence courses, and in particular Welcome All prompted them to produce additional information sheets for their visitors e.g. a tube access guide in brail and a disabled access guide to London's main attractions. Participation in the Welcome All scheme also prompted a member of staff to attend a sign language course.

## Negative Impacts of Participation



Base: All current users (N=744)

TNS Travel & Tourism

### *England overall*

Over 8 in 10 respondents were of the opinion that participation in the Welcome to Excellence courses did not have any negative impacts (82%). However, when those respondents who did not answer the question are excluded from the analysis this proportion increased to 97%. Only 2% of respondents were of the opinion there were any negative impacts. This proportion increased to 6% amongst respondents in the North East and 4% in the North West. Due to the relatively small sample sizes involved these results should be treated with some degree of caution.

### **Key points**

**Nearly all respondents answering the question believed there were no negative impacts on their business as a result of participation.**

*Booster areas*

*South East and Dorset* – 85% (increasing to 99% of those answering) stated there were no negative impacts on their business.

*Heart of England* – 83% (increasing to 97% of those answering) were of the opinion there were no negative impacts.

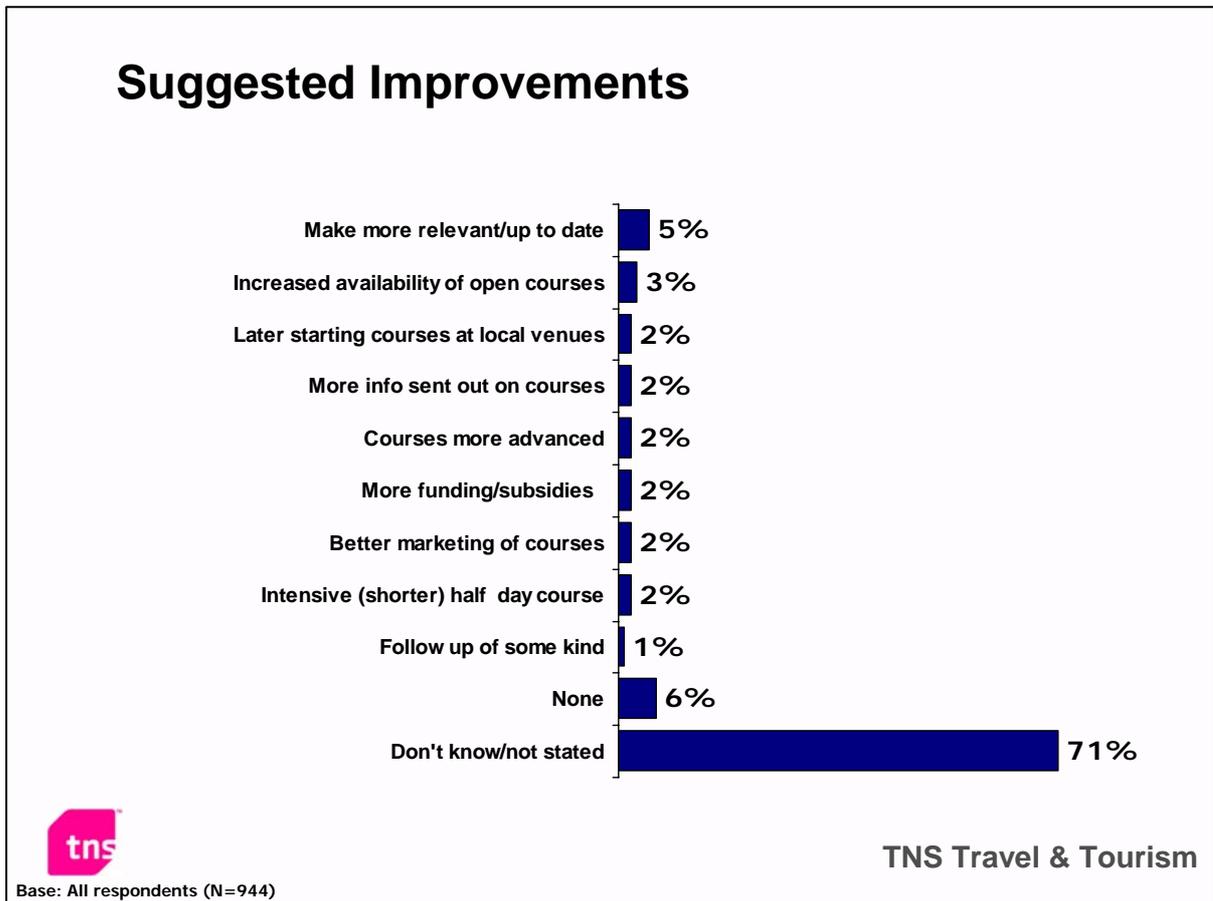
*North West* - 79% (or 95% of those answering) in the North West believed there were no negative impacts associated with participation in Welcome to Excellence.

The vast majority of respondents in the depth interviews were also of the opinion that there were no negative impacts or disadvantages of participation. The only negative impact mentioned by a couple of respondents was that some participants may feel the course is too basic and a waste of time which, may in turn, spoil it for others in attendance.

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## Improvements and Recommendations

The final section of the survey gave all respondents the opportunity to suggest any improvements to the Welcome to Excellence courses.



### England overall

All respondents in the survey (N=944) were then asked to suggest any changes to improve the Welcome to Excellence training courses. As a significant proportion of respondents were unable suggest any improvements or indicated nothing could be improved (77%) this would suggest relatively high levels of satisfaction. The most frequently cited suggestions were to make the courses more relevant and up to date (5%) and increase the availability of open courses (3%). None of the other suggestions were cited by more than 2% of respondents.

### Key points

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**Emphasising the high levels of satisfaction with the courses, over three-quarters of respondents were unable to suggest any improvements or stated that nothing could be improved (77%).**

*Booster areas*

*South East and Dorset* – 62% couldn't think of any improvements, 9% said nothing could be improved, 5% suggested making the courses more relevant/up to date, 4% each said better marketing, increased availability of open courses and later courses starting at local venues.

*Heart of England* - 72% were unable to suggest any improvements, 2% said nothing could be improved, 6% suggested make the courses more relevant/up to date, 5% stated increased availability of open courses and 4% asked for more information to be sent out on courses.

*North West* - 71% were unable to suggest any improvements, 9% believed that nothing could be improved and 3% of respondents mentioned each of the following: increased availability of open courses, later starting courses at local venues, more information sent out on courses, more funding/subsidies, a follow up on courses and better marketing of courses.

Consistent with the findings above and reinforcing the high levels of satisfaction, the majority of respondents could not think of any changes to improve the Welcome to Excellence courses.

*Can't think of anything....enjoy working with the materials  
and the students love it.*

*It's a good course.....keep up the good work.*

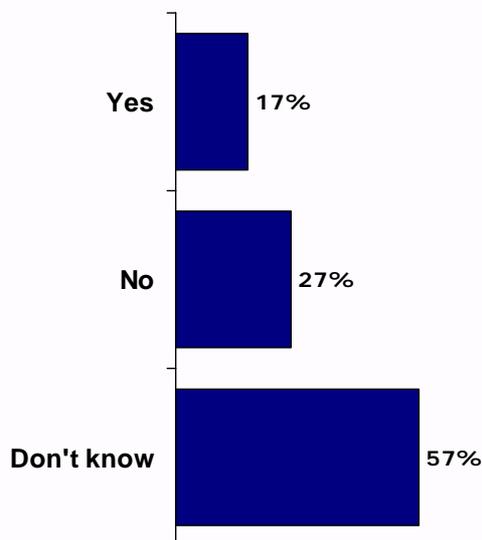
Amongst those who were able to suggest anything, most of the comments related to keeping the courses up to date.

*...as long as it continues to incorporate the latest  
aspects....*

*More up to date support materials....*

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## Additional Training Courses



Base: All respondents (N=944)

TNS Travel & Tourism

### *England overall*

Over half of respondents were unsure if there was any need for additional follow up courses in the Welcome to Excellence series (57%). Less than 1 in 5 felt there was a requirement for other courses (17%) and more than a quarter did not believe there was a need for any further Welcome to Excellence courses (27%). TICs, local authorities and chambers of commerce were more likely than average to think there was a need for additional training courses (29%).

Those who felt there was a need for other courses were then asked to give details on the types of courses they would like to see provided. Amongst those who answered the question (N=121), the main suggestion was some type of retail or sales course which deals with difficult customers (41%). Other courses mentioned included: quality and standards (11%), health and hygiene (7%), supervisory/management skills (7%), reception/clerical skills (6%) and tourism attraction specific courses (4%).

## Key points

**Over half of respondents were unsure if there was any need for additional follow up courses in the Welcome to Excellence series (57%). Amongst those who were of the opinion there was a need for additional courses (17%), a sales and retail course, dealing with difficult customers was the type most requested.**

### *Booster areas*

*South East and Dorset* – 51% didn't know if additional courses were required, 33% were of the opinion there was not a need for additional courses and 17% would like to see further courses provided.

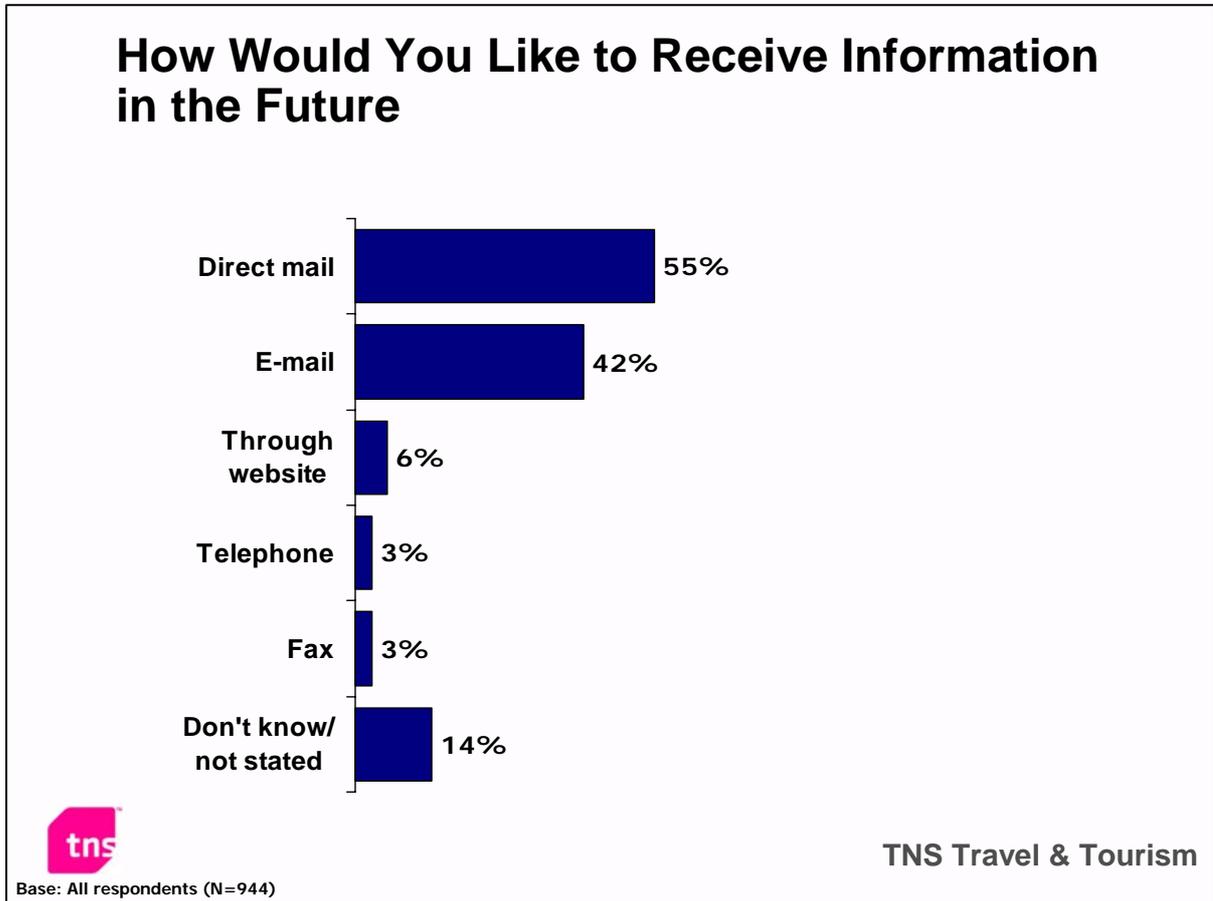
*Heart of England* – 62% didn't know if additional courses were required, 16% thought there was not a need for additional courses and 22% would like to see further courses provided.

*North West* – Just over half of respondents didn't know if additional courses were required (52%), 27% did not believe there was a need for additional courses and 21% would like to see further courses provided.

In the consultations, most respondents were able to offer suggestion in terms of additional training courses they would like to see provided under the Welcome to Excellence brand. However, a wide variety of courses were mentioned with most only cited by one respondent:

- training programme on how to train staff
  - team leader/supervisory course
  - how to manage staff in a caring way
  - sales and marketing skills
  - advanced telephone skills
  - longer courses.
-

Finally, all respondents were asked how they would like to receive information about the Welcome to Excellence courses in the future.



#### *England overall*

Just over half of respondents indicated they would like to receive information about Welcome to Excellence via direct mail (55%). However, a significant proportion also requested e-mail correspondence (42%). Those types of organisations more likely than average to request information by direct mail included: respondents in the Heart of England and Cumbria (61%), visitor attractions and museums (60%), hotels (63%) and holiday/camping parks and hostels (60%). In contrast, those organisations that expressed a preference for e-mail correspondence included: those in the South East (57%), education establishments (61%) and TICs, local authorities and chambers of commerce (53%).

## **Key points**

**On average, a slightly higher proportion of respondents expressed a preference to receive information about Welcome to Excellence by direct mail (55%) compared to e-mail (42%).**

### *Booster areas*

*South East and Dorset* – The majority of respondents in this region preferred to receive any information by e-mail (57%) or direct mail (54%).

*Heart of England* – The largest proportion of respondents wanted information sent via direct mail (61%) and a further 37% requested e-mail.

*North West* – 58% wanted to receive information by direct mail and a slightly lower proportion requested e-mail correspondence (44%).

Quite a few of those respondents interviewed in the consultations indicated that a brochure containing information on all the Welcome to Excellence courses would be a useful way to learn more about the courses they didn't currently use or were not aware of. Direct mail was the preferred form of delivery for this information.

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## C. Conclusions

On the basis of the information presented in the preceding section of this report, the following conclusions can be highlighted for consideration by the regional tourism organisations:

1. The principal role played by the regional tourism organisations in the promotion of the Welcome to Excellence suite of courses was evident from the research with the majority of respondents indicating they first heard about the courses from their regional tourism organisation. However, informal sources, particularly word of mouth recommendation from colleagues or other delegates on course(s) were also highlighted as influential in raising the awareness and encouraging participation of further courses.
  2. Although awareness and participation levels of Welcome Host were very high, the comparative results for many of the other courses were markedly lower, particularly for Welcome Line and Welcome E-business. We believe these results highlight an opportunity for the regional tourism organisations to increase communication levels with regard to these other courses. Indeed, when probed about reasons for not participating in other courses, 'lack of awareness' was one of the key reasons cited and in the consultations it was suggested that a brochure, detailing information on the full range of Welcome to Excellence courses would be an invaluable reference point to gain insight into all courses.
  3. Related to the above is the fact that although the overall Welcome to Excellence brand was recognised by most respondents, there was some evidence to suggest that it was not familiar amongst consumers, particularly since the branding had changed in the last couple of years. On this basis, there would also appear to be an opportunity to promote the Welcome to Excellence brand amongst the general public as well as the public and private sector.
  4. In terms of the delivery methods used, awareness and usage levels of the 'open course' method were significantly higher than for both in-house and corporate training methods. Given the advantages offered by the in-house and corporate methods were acknowledged, primarily in terms of the time savings, we believe there is considerable merit in encouraging the use of these other delivery methods.
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5. Although the enhancement of staff skills and the provision of a high standard of customer service were the key benefits and reasons for taking part in the Welcome to Excellence courses, it was widely recognised that any improvements in these areas were likely have an indirect impact, on a number of areas of business performance including the recruitment and retention of staff, the level of repeat business and profitability levels. Networking opportunities with other participants on the course was also considered to be an important advantage of participation.
  6. It was encouraging to note that a significant number of respondents stated their main reason for participating in the Welcome to Excellence courses was that the courses were acknowledged as an industry standard. These results would suggest that Welcome to Excellence has a competitive advantage in this area and hence there is an opportunity to build upon this advantage.
  7. The high levels of satisfaction with the Welcome to Excellence courses were illustrated by the fact that two-fifths of respondents rated their participation in Welcome to Excellence as 'better than expected' and for each of the courses approximately 90% or more respondents were satisfied with each element of the course rated in the survey. In addition to this, the majority of respondents were unable to suggest any improvements to the Welcome to Excellence courses. Nevertheless, although only mentioned by a relatively small proportion of respondents, it is worth highlighting that increased flexibility in terms of timings and dates for running open courses and also ensuring the courses were pertinent to the organisations participating in them were cited as ways of improving the courses.
  8. The survey findings also indicated there could be potential in developing the Welcome to Excellence programme further with some interest expressed in the introduction of new training courses. In particular, a retail or sales course which included dealing with difficult customers was the most frequently cited suggestion.
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