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By Carole Baldock  
In collaboration with Harry Jivenmukta

# PROCESSING PAYMENTS AND BASIC BUDGETING

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## COMMON METHODS OF PAYMENT

Describing what the transaction is for and processing the payments:

- ⌘ Facilities need a complete record of incoming and outgoing transactions (the former is a legal requirement)
- ⌘ Checking outstanding and cleared debts
- ⌘ Correct amounts paid at the correct time.

### Methods of payment; purposes

Convenience is a priority. Cash is popular with customers, especially small amounts like entrance fees - quicker than cheques (when there's queues), though not as safe. Receipts are required. Temporary workers are sometimes paid in cash, but this means more paperwork; other problems include transporting money to the bank.

### Cheques

Customers usually get till receipts; payment is also recorded on the stub and bank statement - NB NOT proof of payment. Cheque guarantee cards are required; sometimes a problem with purchases above the limit. Cheques are usually 'crossed' so payees must pay them into an account (they cannot be cashed). Commonly used for payment by post; if lost or stolen (cash would be gone for good), you tell the bank to 'stop' them, then no money comes out of your account. Facilities often pay by cheque (e.g. stock), with certain employees as authorised signatories.

### Vouchers

- ⌘ Special offers (part or full payment) to attract business; sometimes part of a facility's brochures.
- ⌘ Joint promotions, for another organisation's products or services. Sent off for refunding when it's over; credit notes are sometimes issued.
- ⌘ Instead of cash refunds, exchanged for faulty goods or making good an over-payment (the amount due may be deducted from outstanding debits). Replacements need to be the same price; change is rarely given.

### Credit cards

Senior staff members use their facility's credit cards e.g. on business trips (fares, hotel bills etc.).

Facilities display signs about accepting credit cards (up to a certain amount, i.e. floor limit; anything above must be cleared with the credit card company, who may not authorise purchases close to that amount). On acceptance of payment, they issue a voucher: customer's copy; company's copy; two for themselves.

Monthly statements show each transaction, balance and minimum payment required. Unless paid in full, interest is charged at a high rate. Credit cards are so common, many young people haven't a clue about using cheque-books - nor qualms about buy now, pay later, which causes problems because it's easy to get into debt.

Debit cards may eventually replace cheques; payment is immediately deducted from customers' accounts, received within three days. Some are now also used as cheque guarantees, and at dispensers.

# PROCESSING PAYMENTS AND BASIC BUDGETING

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Direct debit (authorised by completing a form): automatic removal of an amount from your account. Companies can amend the amount, but must keep you informed.

Standing orders are similar, except the amount is decided by the customer. Both are convenient for regular payments (therefore discounts are sometimes allowed), though suppliers may initially require cash payment.

Electronic Data Interchange (EDI) enables buying and selling via the Internet (credit details). The Banks' Automated Clearing system (BACS) transfers funds from one person/organisation's account to another, handling various amounts and accounts (paying wages etc.).

## Keeping accurate records

It's important to note all transactions (manually or on computer):

Customer queries:

- ⌘ Payment received
- ⌘ Providing up to date information
- ⌘ Checking on standing orders and BACs
- ⌘ Changing the amount.

Calculating income: manual entries in ledgers: income; expenditure; customers' and facilities' accounts. Facilities regularly check profit and loss.

Providing data for management helps them monitor the facility and its products and services. Cash flow: using payments on settlement of debts to buy more stock, which when sold, generates income, used to buy more goods; credit buys facilities time, making more money available.

Facilities make projections for future expenses from their income and produce company accounts, e.g. providing documents for audit inspection, Tax and VAT inspection (VAT is a government tax, 17.5%, applied to most goods).

## Secure systems for handing and recording payments received

Cash payments: e.g. souvenirs. Till rolls provide a record of payments. There should be one key in use, with a second kept in a safe place; takings banked daily.

Cheques

The following are important because of the time lapse in receiving payment (e.g., customers sometimes don't have the money in their accounts when writing cheques):

- ⌘ Signature and date correct
- ⌘ Amount due and words match
- ⌘ Alterations clear and initialled.

Cards

As above - check expiry date. Customers then confirm details are correct.

Vouchers

Verify rules of eligibility: past the sell-by date; used in conjunction with specific products and/or services?

Alarm systems protect staff, cash, goods and premises:

Panic buttons

Side and rear doors (day-time); whole facility (night-time)

Patrols to check systems.

Staff who regularly handle cash must be trained (sometimes with help from local police; refresher courses), undergoing practical drills.

Tills should be emptied regularly - less chance of large amounts being stolen. Storing takings (especially loads of money) overnight in facilities is not advisable, so safes (freestanding and built-in) are usually placed where clearly visible, to deter thieves; when illuminated at night, full-time security staff may be unnecessary. Built-in safes may also be sited in secure areas, away from public access. Those with time delay locks can be opened only at preset times, but the inconvenience means they're not common.

Calculating customer payments

Double check all calculations; it's easy to slip up, faced with columns of numbers. Everybody makes mistakes but it's best avoided with money: overcharged customers get upset, as do underpaid facilities. One little error can affect other documents, so accounts won't balance - more work for you, and others, to sort out. Repercussions could affect your job.

- ⌘ Items are listed on an invoice, which describes the product or service, enabling both parties to double check.
- ⌘ Quantity and basic price may include VAT and/or discounts (small deduction sometimes made for prompt and/or cash payment; trade discount: regular customers or purchases of large quantities).
- ⌘ Gross: the totals (all items added together); net: amount due (less deductions but VAT added).

## Processing incoming payments accurately

Preparing a bill

- ⌘ By hand or using a till (slips show the purchase: quantity, price; any discount or VAT; increasingly, the employee's name is included - even more important to avoid mistakes). The correct amount of change is calculated; when giving change, count it out in front of customers to avoid disputes.
- ⌘ Issuing a receipt
- ⌘ Proof of purchase
- ⌘ Claiming expenses (using your own money for something employers pay for, e.g. rail tickets on business trips).
- ⌘ Obtaining goods, i.e. collecting prescriptions.
- ⌘ Details: amount; item; date; possibly customer's name and address. The customer and the shop retain one copy each. If handwritten, ensure all information is legible.

# PROCESSING PAYMENTS AND BASIC BUDGETING

## Recording amounts received

Facilities keep till records for information:

- ⌘ Individual items
- ⌘ Total sales and those made by each employee
- ⌘ Refunds
- ⌘ Electronic tills in supermarkets read bar codes; automatically allow discounts; add information about special offers.

Without a till, a payment received sheet records the type of income. Daily sales are logged, including the various payment methods, then transferred to a cash book.

Recording VAT: incoming and outgoing payments: recorded; totalled; quarterly returns submitted. Cheques are forwarded to Customs & Excise to cover underpayments (overpayments, vice versa).

Summaries of payments received: facilities monitor finances using completed accounts: dates of payments; amounts; description; methods.

## PROCESS OUTGOING PAYMENTS

### Payments commonly made

Organisations maintain records of all transactions to keep within their budget (amount allocated for spending), otherwise, the more transactions, the more likely problems, e.g. wrong items sent out. Facilities purchase goods as needed, often on credit. Computers simplify paperwork: small, specific jobs or weekly amount of work.

Wages and salaries: processed within the facility: cheque or BACs: staff's monthly payments; cash: temporary work (seasonal; occasional specialist instructors); repairs.

Goods and services: most facilities settle bills each month or within a set period. It's common practice to wait until receiving a reminder (or several).

Items necessary to operate effectively. These vary, depending on amenities:

- ⌘ Choice of food and drink
- ⌘ Specialist instructors
- ⌘ Publicity for events programme.

### Processing documents

See above for payment methods. Basic calculations require mathematical skills, e.g., addition or working out percentages. Accuracy is essential.

Items which require checking: quantity and price (comparing order and invoice, querying discrepancies; 17.5% for VAT is an awkward amount). Take care with sub-totals, e.g. various discounts (three for the price of two etc.), to ensure correct totals. Other calculations involve extra payments, e.g. same day delivery.

## Recording

- ⌘ Invoices: the quicker they're issued, the more prompt settlement (providing they're correct).
- ⌘ Credit notes: proof of purchase when returning faulty goods; authorise cash refunds or refund vouchers for credit companies to adjust customers' balance. The various receipts (e.g., obtaining petty cash) go to Accounts, to record incoming and outgoing payments.
- ⌘ Breakdown of expenses: each transaction adds to the financial records, with different headings for each department. Estimated and actual amounts are compared, to keep within the budget.
- ⌘ Summaries of payments come from suppliers: monthly statements of accounts listing all transactions, total invoices issued to customers, less payments received; balance equals amount outstanding. Facilities can check what customers have received and what they owe.
- ⌘ Matching methods and purposes of payment (regular and occasional staff and suppliers; small irregular payments): see above.

## PREPARING A BASIC CASH FLOW BUDGET

Parameters for a Leisure and Tourism Event. The tutor sets these restrictions and the choice of event. Needs and demands for the event contribute to success (especially when for a good cause).

- ⌘ Potential customers: different events suit different ages - trickier out of your age group, though there'll be children, for example, in your family and your friends'.
- ⌘ Make sure of basic requirements before choosing activities for the event. You may need permission for certain venues, affecting facilities and resources. Which are essential? What materials and equipment are required? What skills?
- ⌘ Estimating numbers attending is difficult. Calculations should NOT be over-optimistic. Keep it flexible, e.g. catering, and avoid clashing with other events (similar; long-running; popular). High entrance fees put people off, yet too low is equated with 'cheap' rather than 'bargain'. What about concessions (family ticket)? Use round figures to simplify giving change.
- ⌘ While aiming to make some profit, the financial target depends on initial outlay. A facility's annual accounts show gross profit i.e. total sales (including stock), less the cost of making the goods etc. Net: gross profit minus running expenses, e.g., rent.

## Sources of income

Along with entrance fees, souvenirs are profitable, although sometimes complicated to arrange/make: badges, T shirts.

The programme could incorporate a raffle; 'free' programmes are covered by entrance fees. Plan well in advance.

Refreshments: cans, crisps, sweets make simple snacks; home-made food means more profit BUT more effort, with the risk of running out or mountains of leftovers.

# PROCESSING PAYMENTS AND BASIC BUDGETING

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Sponsorship (either monetary and/or payment in kind) is excellent publicity, simultaneously adding credibility and prestige to your project. Make your application to local companies stand out, presenting all necessary information. Grants may be available (e.g. local council); ask your tutor's advice.

Estimating income

Potential problems, e.g. miscalculations. Being over optimistic often leads to embarrassment.

Necessary expenditure

Extra wages for staff, e.g., hiring a coach. Equipment: charge may be hourly, daily - even free. Venue: usually a charge (depending on time and space); may cover staff and equipment. Is insurance required? Publicity: press releases; posters; leaflets; note means of distribution, listing possible outlets. Materials: even paper ranges from tickets to bin liners. Other costs: covering breakages; transport, people.

Estimate of expenditure for the event: essential to create the cash flow budget; allow for all potential costs. With first attempts, miscalculations or overlooking something are more likely; experience means more reliable estimates.

Preparing a basic cash flow budget

Private companies have to keep accounts for three years; public companies: six. A facility's management needs to know its financial position - as do outside organisations, e.g. the Inland Revenue.

Payments received: recorded in a cash book; a payments received sheet; or on computer (spreadsheet), showing debits (amount owing) and credits (payments made); 'balance brought down': amount carried forward from previous month. Cheque payments are entered in the 'bank' column.

Estimated income

Payment for products and services, plus any interest for money banked or commission earned (e.g. bonus payment for reaching targets).

Estimated expenses

Includes 'finished goods': e.g. canned drinks; 'part-finished' (bread for sandwiches); purchases of raw materials (fuel). Stock: goods on sale, plus items awaiting completion.

Other expenses

Rent or rates; heating; telephone; wages.

Need for advance.

List of items which must be purchased before the event (paper for publicity posters), otherwise it cannot go ahead. These costs are usually recouped from the profits.

EXERCISE: Maths aren't everybody's strong point. Find out your weak spots by double-checking somebody else's budget calculations for an event: income and expenditure, using various skills e.g. calculating percentages.

# CONTRIBUTING TO A TEAM ACTIVITY

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## PLAN AN ACTIVITY WITH A TEAM

Checking all members understand the objectives. To deal with an activity (or a problem) requires planning, execution and review:

- ⌘ Working out what needs doing (plus the necessary knowledge)
- ⌘ Carrying out the activity
- ⌘ Assessing how it was done.

### Agreeing how to meet objectives

The 'team' (minimum of three people) aims to agree on an activity and understand what's involved, which means lots of discussions, i.e. arguments. Don't worry about appearing stupid when raising questions - it's much worse if you didn't understand something or had doubts, and it turns into a disaster which then needs putting right.

Begin with a plan of action, listing necessary resources and who's doing what. Impossible? Things tend to get sorted out.

### Contributing to identifying resources

- ⌘ Finance: note everything spent - difficult to check up later.
- ⌘ People: including help and advice from those outside the team.
- ⌘ Materials and equipment no guarantee they'll be available; make sure of your basics (from pens to computers). List essentials, plus what could be useful.
- ⌘ Information: various sources: people; libraries; computers.

### Which members carry out which parts of the activity

Nobody fancies being stuck with boring and/or complicated stuff (even when useful, like finances). Some people are more talented or skilful, but don't confuse them - skills are learnt, NOT natural abilities: work with somebody who's mastered something. Tasks can be divided between two people. Or draw lots, or take turns tackling unpopular jobs.

### Actions to anticipate problems; maintaining health and safety

Careful preparation identifies problems, and avoids given problems:

- ⌘ Allowing plenty of time
- ⌘ Checking everything required is available
- ⌘ Making sure nothing's over-looked.

Consider alternatives when anticipating difficulties, i.e., plan B. Plans C to Z is over-doing it, because every single thing is unlikely to go wrong. Besides, you learn from mistakes - not to do the same thing again.

Ensure your actions don't endanger you yourself or others, and watch out for other people endangering you. Carelessness causes accidents. Equipment and materials often need careful handling; treat anything potentially dangerous with caution.



# CONTRIBUTING TO A TEAM ACTIVITY

Producing a realistic team plan

Agenda for the first meeting:

- ⌘ List what's to be discussed
- ⌘ Produce a timetable, and emergency back-up plan.

All necessary tasks are listed, allocated, and targets set for members, and team. An organised start makes work, and monitoring progress, easier.

Producing a plan of own role

You're assessed as a group and as individuals, so keep a log. Note your tasks and activities:

- ⌘ Helps organisation and double-checking
- ⌘ Provides a record
- ⌘ Simplifies the review (facts to hand, rather than you racking your brains).

## UNDERTAKING A ROLE IN A TEAM ACTIVITY

Carrying out activities in both plans

Things may not get done in time (or at all); people don't turn up or change their mind; don't do enough or take too much on. Individual plans are easier to stick to.

A successful outcome depends on:

- ⌘ Clarifying aims
- ⌘ Making the best use of resources
- ⌘ Taking health and safety into account
- ⌘ Co-operating with others (especially problems).

Dealing with the latter: simpler when members each complete a form to double-check tasks: who's supposed to do them; who actually did them; the time involved.

Making best use of resources

Finances: note costs and usefulness of each item

Materials and equipment: original lists need updating (especially with problems) - handy for review.

Information

Note people consulted and response. Check with team members first; they may have the answer, or know somebody who does.

Questionnaires are good for collecting data, but people don't like completing them (especially when complicated) - insufficient information. Yet a good response means wading through material; a sample of about 50 is sufficient. Simple forms list 'closed' questions, ticking 'Yes' or 'No', although requesting opinions provides a clearer picture. Obtaining information means research; note sources, to double-check facts.

# CONTRIBUTING TO A TEAM ACTIVITY

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## Maintaining health and safety

Note any problems, along with the action taken (self and other people). Report those involving materials and equipment.

## Co-operating with others

Team-work skills include helping other members - NOT arguing.

## Responding to problems promptly and correctly

A team effort helps ensure solutions won't make matters worse. Anybody who has already been in a similar situation knows what action to take to resolve the problem. Agree which member takes the responsibility, or report the problem to the person responsible; the tutor may refer you to somebody like a computer technician. Good planning provides alternatives to anticipated problems, but allow for unexpected problems, e.g. somebody's absence. Note solutions, and repercussions.

## REVIEWING THE ACTIVITY

### Review meeting of objectives

Progress logs review the teams' and the individual's performance, providing evidence of work carried out (which the tutor may not observe), and backing up explanations. Note major points, good and bad (not in great detail, or attempts to impress people), plus the tutor's comments and your response.

Reviewing through discussion: team; each member; tutor.

Feedback is essential, to judge success (or failure), and check everyone is satisfied. Nobody likes criticism, no matter how constructive; discussion is more bearable:

- ⌘ Suggestions about improvements
- ⌘ Easier ways of doing something
- ⌘ How to avoid leaving anything out; what to do when that happens.

Each person's contribution must be made clear all the way through, giving them a chance to catch up. Most tasks can be carried out in stages - certain (simpler) aspects are sometimes done at the expense of others.

### Reviewing resources

Finance: estimated and actual costs compared; was money well spent?

Materials and equipment: Note most useful items, and those available when required. Was specialist knowledge required? Did it take time to find out more? NB: useful to compare with other teams.

People: information obtained: useful; insufficient; excessive? Were the right questions asked? Did mistakes arise because nothing was double-checked? The more people learn to trust their own judgement, the more they're entitled to the credit.

Information: was the data used effectively? Were questionnaires and format appropriate, and processed properly? Was time wasted working out what information was required, and where to obtain it?

# CONTRIBUTING TO A TEAM ACTIVITY

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## Reviewing problems

Things which seem 100% fine theoretically are tested out only in practice; problems arise because of people and things (especially computers). Did any unexpected problems remain unsolved? Did they evolve into those which could be anticipated, and avoided? Were any caused by the team itself?

## Reviewing health and safety

Did your actions ever endanger you and/or others? Vice versa? Was everyone aware of possible risks (including materials and equipment)? How to avoid in future?

## Providing feedback; responding constructively

Feedback is essential, but liable to be ignored if yelled at someone in front of everybody, or criticism from your peers, rather than somebody in authority (like the tutor). Criticism involves positive AND negative points; it's easier to accept once you learn to assess yourself and your work.

## Suggesting improvements

- ⌘ Improving performance (team and individual)
- ⌘ Was every problem solved or not? What was the eventual outcome?
- ⌘ Did it improve the team's response to subsequent problems; did you come up with alternatives?
- ⌘ Was it more practical working as a team, or in pairs?
- ⌘ If help had to be requested, was it appreciated or resented?

## Resources

- ⌘ Was there much difference to the estimated use?
- ⌘ What actually proved useful?

## Response to problems

- ⌘ Was the team able to cope?
- ⌘ Did you rely on the tutor?

## Health and safety

- ⌘ Did problems arise or cause risks?
- ⌘ Was there sufficient training?

## EXERCISE

One member of the team keeps letting people down, and everybody's moaning about it. When you lose your temper with them... nobody backs you up. How do you feel about the situation? And how do you think they feel?

# PRESENTATION AND DISPLAY

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## WAYS OF DISPLAYING AND PRESENTING INFORMATION

Common types of presentation

Sales promotions goals:

- ⌘ Gaining new customers
- ⌘ Ensuring customer loyalty
- ⌘ Repeat purchases.

Most businesses utilise various methods, including:

- ⌘ holding sales
- ⌘ Price reductions
- ⌘ Coupons and vouchers
- ⌘ Free gifts and cash bonuses
- ⌘ Competitions and lotteries.

### Sales seminars

Staff training is vital: thorough knowledge of products and services (and competitors'), plus practical experience to demonstrate use and satisfy customer needs, including handling complaints.

Product launches:

- ⌘ Displays
- ⌘ Exhibitions
- ⌘ Demonstrations
- ⌘ Inviting customers to use products for a trial period, or compare with similar items.

Success comes from 'the marketing mix': Product; Place; Price; Promotion.

Sales conversations: face to face or over the phone. Sales personnel are now 'advisors', 'consultants' or 'customer services', their role to establish good rapport with customers and meet their needs, providing correct information and advice, in order to make sales.

### Types of display

With insufficient space, facilities sometimes use posters - or other sites (the local library), perhaps as part of an exhibition. Most local organisations help each other out.

Window: usual site, encouraging passers-by to take a good look. Window dressing: posters and pelmets (round the edges) or full displays:

- ⌘ Dummy packs
- ⌘ Trade figures (large or life-size cardboard cutouts)
- ⌘ Illumination
- ⌘ All the above.

Point of sale: counter (space may be limited); the shop itself; a facility's reception or refreshment area.  
Various items:

- ⌘ Mobiles
- ⌘ Posters (backdrop)
- ⌘ Wire stands suspended from the counter
- ⌘ Dispenser boxes for leaflets and show cards (portable displays) on top
- ⌘ Dump bins in front.

## Public places

Best sites - ample customer access:

- ⌘ Entrances
- ⌘ Corridors
- ⌘ Refreshment areas
- ⌘ Outside the facility, e.g. tourist information centres. Window display props can be utilised.

In addition:

- ⌘ Video screens (demonstrations)
- ⌘ Illuminated displays
- ⌘ Stands and dispensers.

Note health and safety: displays shouldn't cause obstruction or any inconvenience.

Posters in advertising sites are changed about every three months: hoardings; stations (bus and train); airports; inside and outside buildings. The minimum number of posters are placed for maximum effect.

## Matching materials with different types of presentation and display

Videos are popular because they're versatile, BUT must be professionally made or they'll look terrible.

Slides (still photos changing at regular intervals, about one minute) and advertisements referring to leaflets and/or brochures need a stock handy.

Overhead transparencies: backdrops. A single image means more space for information (usually sited where customers have time to read, i.e. waiting areas).

Leaflets and brochures: designed for customers to get the message, creating awareness of products and services so people buy/use them: straightforward text, short sentences and paragraphs.

Poster design depends on the site: pictures plus simple text appeal to onlookers.

Notices: important messages (more text; see above); sometimes used instead of display, where space is limited.

Props: physical items to enhance displays, e.g. equipment (made secure, to avoid theft). Also: dummy packs; 3-D or portable displays; even books and magazines.

Goods: simple displays commonly found in supermarkets (packaging is designed to attract customers), placed where staff can keep an eye on them. Avoid valuable items (need locking away).

Materials (printed, hand-made) e.g. posters, brochures. Most displays: backdrop with props and 3-D items in front. Items for customers (leaflets) must be accessible. Printed matter is usually available; in small facilities, use computer software if producing your own, unless brilliantly artistic.

Adhesives (making display sturdier): get the right kind, following directions carefully.

## Describing examples of local displays

Three detailed examples required: advertising sites; public places; window and point of sale displays.

What: main purpose is to attract customers: promoting products or services (new or improved); announcing events; even creating a 'busy' effect to fill space. Why: the message must be clear to all customers (if not, why not?). How it is created depends on space, budget and materials. Where also depends on space available; it may be one of several displays.

## Effective displays

Key features:

- ⌘ Timing: well in advance (not so much people ignore it or become bored); services and products available simultaneously.
- ⌘ Location: prominent, neither too busy nor too quiet, convenient for staff to keep leaflets stocked up and/or an eye on props
- ⌘ Target audiences: if this were guaranteed, promotion would be far easier. Identify correct markets: match what's on offer with those who most need it.
- ⌘ Style: choice of colour, image, lettering (i.e., VERY Up-To-Date Fonts) influence people. Text is important: short and snappy, making use of slogans:
- ⌘ Personal touch/informality ('You're')
- ⌘ 'Promising' adjectives: 'new' or 'wonderful'
- ⌘ Alliteration ('BIG bargains')
- ⌘ Repetition and imperatives ('Buy now!') reinforce the message, helping customers remember what they've read (just don't bore them).
- ⌘ Exclamation marks!!!!

## PROPOSE A DISPLAY IDEA

### Ideas for a display

What: studying other displays can provide inspiration. How: Keep it Simple or space; time; budget; resources may cause difficulties. Why: Purpose? Picking something you like simplifies matters. Where: solo display or part of a set? On show 24 hours? Keep surrounding area tidy to avoid a bad impression.

Display

You'll need permission from the facility (following company policy). Some areas have more potential than others; anything on the counter could be missed by customers browsing rather than buying.

Brief: purpose and target audience.

# PRESENTATION AND DISPLAY

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Objectives: to convey a clear message via the highest standards.

Audience profile: getting the right information to the right customers at the right time.

Selecting an idea which meets requirements

- ⌘ Timing: ample provision for preparation and putting the display together, especially when promoting one off events, or plans are complicated. Permanent displays: more information (programme of events); time scale allows more leeway.
- ⌘ Location: the more space, the larger scale the display; greater prominence should attract more customers.
- ⌘ Content and Style depend on resources, plus facility rules and/or guidelines:
- ⌘ House style (colour, use of logo)
- ⌘ Preferred formats: posters, on tables etc.
- ⌘ Images: photographs or graphics; colour or black and white.

## Resources

Materials; time; finances; skills: stick to a budget, and to what you do best. Seeking advice is time-consuming, whereas creating something simple is often effective. Allow for making changes, if there are problems.

Presenting the idea

Format: verbal; written; graphic. Or a combination: speech, then hand-outs. Graphics, utilising diagrams, are good for anything complex. Notes (why; what; how; where) make verbal presentation easier although written presentations can include everything. Method of presentation: one you prefer, that you're comfortable with.

Suggesting ideas for materials

Videos; posters; props; etc. are part of the display, others are for customers, e.g. leaflets. Allow time for preparation.

## SET UP A DISPLAY

### Health and safety requirements

The display area must be safe, during and after setting up: you, colleagues; staff members; customers. Consider hygiene, if using food.

Requirements relating to people including:

- ⌘ Injury (chemicals) to hands
- ⌘ Dropping heavy objects
- ⌘ Extreme temperatures
- ⌘ Fire risk: using inflammable materials; placed in direct sunlight (smoking areas).

Learn the fire drill and how to use the necessary equipment.

- ⌘ Displays: must not create hazards; double check everything is secure. Take care using electrical equipment.
- ⌘ Heavy materials: stored accessibly to avoid accidents or obstruction. Others, kept safe and dry (in containers if necessary). Store away anything not in use; dispose of it when no longer required.
- ⌘ Equipment: special requirements apply with anything electrical, e.g. don't leave leads trailing. Switch off anything which needs repairing (and call in an expert); unplug everything when finished.
- ⌘ Don't use tools or machines without training.
- ⌘ Follow instructions carefully, using things for their proper purpose.
- ⌘ Use protective equipment when required and learn safety rules.

## Preparing resources

### Media/materials

The facility may provide printed materials, which can be expensive; put them to good use. When making your own, you'll find wastefulness is annoying.

### Tools and equipment

Always keep secure. Don't leave anything unattended, and place items for optimum use; anything reflective, check it can be seen, and doesn't dazzle.

### Other resources

A rough timetable helps planning, e.g., skills may involve asking others for help. Double check requirements, to stay within your budget.

### Setting up the display: health & safety

If found to cause a hazard, changing plans could take up time.

## Specification

### Plans

The display must be in keeping with the agreed format, without causing health and safety problems. A diagram is helpful. Take photos of the display as a record.

### Recorded proposals

List costs, design, resources, schedules, location etc. Did they work? Was everything on time? Problems: changes; extra costs; resources wasted? Successful design?

Once the display is dismantled, the area must be left clean and safe, with unused resources returned or correctly disposed of. Mess (and lack of consideration) creates a bad impression, as do out-of-date displays; leave the area ready for others to use. Return anything borrowed in its original condition, losses being made good. Paper and glass can be recycled; other waste collected in bin bags.

### EXERCISE:

Choosing a favourite activity, design a display to appeal to your friends. Then one to attract people from another group: older; special needs; visitors from abroad.



# PLANNING ITINERARIES AND MAKING BOOKINGS

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## PRODUCING A SCHEDULE FOR A VISIT

### Main features and activities:

Visitors don't participate (talks)

Interaction (meetings)

Visitor requirements, e.g. services (toilet facilities).

Talks and Seminars

Talks:

Presentations by facilities (e.g. describing services)

Held at facilities (any subject).

Seminars: often more informal (smaller venues; fewer people), sometimes follow talks, allowing feedback and networking.

Meetings depend on numbers, e.g. conferences, which place greater demands on staff and resources (technical support).

Refreshments: usually part of the package (day long visit: coffee and biscuits on arrival and departure; 'tea breaks'; lunch). Note dietary needs.

Physical activities (business and/or pleasure): sports training (indoors or outside); psychological motivation (encourage team spirit etc.); social events or competitions. Facilities sometimes booked for sole use by one group (during slack periods).

### Planning times for a visit

Schedules depend on communication. Both parties diary dates, avoiding clashes with other events. Note travelling times, plus arrival - locating entrance etc.

Introduction to facility, attraction, event

Useful if the manager or reception staff (briefed with details: group size, purpose) make a presentation outlining the itinerary. Visitors also receive hand-outs or information packs.

Arrival (time and place): clear to visitors and relevant staff, avoiding delays and problems (and embarrassment). Similarly, name(s) of the person(s) to meet. The contact is usually reception; staff then take visitors to their leader.

Activities (decided by organisers and facilities): outlined in the introduction, more detailed in hand-outs.

Timings of refreshments: announced at the start: length; location of toilet facilities. Equally important: departure time (visitors may have a long and/or complicated, return journey). Visits should finish on time, avoiding inconvenience all round. Provide all relevant travel information: timetables; maps (city and street); clear directions.

### Timings

Avoid problems - allow time for travelling AND visits. Convenient for everybody involved? Confirm, preferably in writing. Good organisation: when planning, list all necessary information, including start and finish times. People expect visits to be worthwhile.

The length of the visit must be clear to everyone - is it worse to run out of time or have everyone hanging around? Double check length of activities; will they all fit in? People don't want long journeys for something lasting about an hour, nor miss things because of delays.

Times of arrival, departure and breaks

Late starts can lead downhill, whether visitors or facility staff are held up; keep everyone informed. Confirm whether visits involve overnight stays; visitors may want to bring their own refreshments for short stays, or know what's available near by.

Available resources

Money: Prime consideration. Organisers may be totally responsible or share costs with visitors; venues usually cough up when promotional or providing information. Sometimes funding is available, e.g. local council.

Equipment (computers, videos etc.): usually provided (or hired) by facilities.

Premises

Venues must be suitable: group size and purpose (i.e., use of equipment). Possible problems: double-booking; over-heating; noise.

Refreshments

Where and how will they be served? What is required; who is serving up? A separate room allows visitors to relax and meet other people.

People ('human resources'): organise appointments so relevant staff are available.

Provide the necessary transport details, allowing for specific needs (collecting visitors by car).

Constraints

Health and Safety (particularly when using equipment) - all visits, whether for half an hour or days.

## Security and confidentiality

Visitors AND venue - ensure nobody wanders off. People usually report to reception, sign the visitors' book, then escorted to the meeting point.

Other means of assisting visitors and ensuring security:

- ⌘ Clear directions (maps)
- ⌘ Name badges for staff
- ⌘ Computers: codes and passwords.

Several groups of other people visiting (using different rooms for different activities - tricky if two rival groups) may strain resources: refreshments, double-booking (staff unavailable).

Producing a schedule

Allowing for resources available and possible constraints:

- ⌘ Travel information
- ⌘ Details of contact and meeting place
- ⌘ Brief introduction (event, facility etc.)
- ⌘ Times: arrival and departure; refreshments; breaks; activities.

## MAKING A BOOKING

### Requirements:

- ⌘ Choice of suitable date
- ⌘ Event or activity
- ⌘ Facility and staff
- ⌘ Transport.
- ⌘ Allow enough for travelling (including arrival) and actual visit (and activities).
- ⌘ Place: one room (or several) in one venue; more than one building; UK or abroad. It could be part of one event, involve individuals or groups.
- ⌘ Equipment: provided by the venue, or obtained by them (or by visitors).
- ⌘ People: visitors and staff may have specific needs (diet, etc.)
- ⌘ Services: en route and at the venue, i.e. toilet facilities.
- ⌘ Suitable transport: to hotel for overnight stay etc. Available when needed, whether coach or taxi?

### Alternatives

#### Problems:

- ⌘ Specific requirements
- ⌘ Unsuitable venue or already booked
- ⌘ Last minute hitch.

Usually, staff or the travel operator try to re-arrange bookings, or make useful suggestions - if given warning. Even disasters are mostly covered by insurance.

#### Documentation and records

Accurate paperwork, with copies on file, assists others, and yourself. Note all bookings.

Booking logs or reservation slip: proof bookings have been made, and by whom. The forms provide useful data and are used as checklists, often requesting details about the organisation; ensures the venue can plan ahead, meeting visitors' requirements. Booking details: entered in the venue's diary and the organiser's; the latter keeps copies of confirmation letters, in case of problems.

Confirmation - Verbal, written or via fax or e-mail (electronically).

Oral (booking by telephone) is fine for something straightforward, i.e. you're already acquainted with the staff, but it's advisable to have something in writing. Ring just before the date to check everything's in order.

Handwritten: sometimes a signature on a compliments slip when returning booking documentation; venues may write back to acknowledge.

Electronic: faxes and e-mail: swift response (up-to-the-minute organisation).

## PREPARING TRAVEL ITINERARIES

Destinations have to be located on a map: major UK cities and destinations in the European Union

Travellers' Needs:

- ⌘ A regular trip or the first time
- ⌘ Usual route or a different one
- ⌘ Time of day (which day?)

### Means of transport

Choice of route: road, rail or air. Change of transport: where routes are not direct to destinations; going by car is probably the most convenient, whether leisurely or A to B (i.e., the motorway, unless there are hold ups; computer programs can assist travellers).

Time is important, especially business appointments. Allow for weather conditions, time zones, rush hour (including seasonal traffic increases). Speed: depends on available transport; specific needs (even travel sickness); time zones. The proverbial scenic route is easiest to enjoy in cars, and common on long journeys, for travellers' comfort, as are stops on way. Facilities on coaches and buses (toilets and refreshments) are usually available, but passengers and drivers need breaks. Include this extra time in the itinerary, along with any change of transport. Often essential, e.g. taxi or coach from airport to hotel, keep to a minimum, to avoid wasting time and the risk of lost baggage (and travellers).

Appropriate cost: a priority, depending on the traveller's budget. Coaches take many times as long as planes but cost half as much.

### Means of travel

Air: domestic flights are expensive but save time, e.g. meetings at the other end of the country, scheduled to last a few hours (allowing for delays, changes of transport etc.).

Rail travel is common, despite delays (e.g. poor connections). More useful and less tiring than travelling by car; meetings can be held on board. Eurostar is popular, but rail travel abroad can be expensive and protracted, requiring changes of transport.

Car or taxi are convenient: own vehicle; company; hired car. Economical, but tiring for the driver - expensive and stressful for business trips abroad, despite the Channel Tunnel. Taxis: where there are likely to be customers e.g. stations; may need pre-booking. This can be done at short notice, like mini-cabs. Both are more expensive than public transport, but handy (e.g., loads of luggage).

Coach travel: scheduled needs booking ahead - usually busy because they're cheap. Private hire is more flexible; the organiser chooses the destination and agrees pick up points, breaks and any detours. Coaches, like buses, are used locally and nationally, but also internationally: fewer stops; more facilities; space for more luggage.

Ferry: slow, necessitating changes of transport. Cheaper than travelling by air, and often more relaxing, even than rail or road.

## Using a timetable

Free, usually readily available. Telephone enquiries: often hard to get through, then finding the right department for information.

Bus and coach: indicate the stops and times. Treat as estimates (buses are on time when you're late reaching the bus stop, delayed when you're early).

Rail: usually biannual. Advisable to book seats (usually compulsory), often an extra charge.

Travelling by air: easiest to book via travel agents (variety of destinations). You can phone (credit card) or get a flight at the airport. Like most trips, payment is made in advance. Sometimes, fares are collected during a journey, or at the end (taxi). Delays are quite common, e.g. buses, when people board without having the right fare.

With the Channel tunnel, the ferry service has become more flexible, with regular crossings. However, elsewhere, e.g., Ireland, book ahead. Sometimes, there's no night service, if the ferry is largely for sightseeing.

## TIMES

### Departure and arrival

NB: 24 hour clock; local time refers to that of the destination, which may differ from the UK. Some people want to avoid overnight travel, others hate setting off at the crack of dawn. These times are estimated; allow extra e.g., with changes of transport and different pick up points. Length of the journey: total number of hours spent travelling, including time zones differences (which passengers may overlook). Calculate journey breaks and estimated time: start, end, duration and reason (some are shorter than others: picking up passengers; sightseeing).

### Calculating times and costs

Travel itineraries

Times; accommodation; means of transport. If complicated, sometimes run to several pages; produce an outline for travellers to carry around for easy reference.

Travel and accommodation arrangements: visitors to a facility, or staff visiting somewhere else:

- ⌘ Individuals or a group
- ⌘ More than one means of transport
- ⌘ UK or abroad.

Itineraries become more complicated according to the number of persons in the party. They'll need to be more flexible: breaks, overnight stays and visits. Can facilities cope with the travellers' various needs:

- ⌘ Dietary requests
- ⌘ Disabled facilities
- ⌘ Suitable entertainment for long journeys
- ⌘ Disasters (people missing the bus)?
- ⌘ Organisers sometimes need to be responsible for passengers' documents.
- ⌘ Date of travel and destination: tickets and accommodation booked (all documents kept together); travel arranged, plus any appointments. International travel is more complex, e.g. obtaining travellers' cheques.

- ⌘ Means of travel: choose the most appropriate (health reasons?).
- ⌘ Point and time of arrival and departure made clear, using the 24 hour clock, and ample overall travel time allowed, in case of delays.
- ⌘ Include details of stops (e.g. connections) for travellers' benefit.
- ⌘ Estimated cost: convenience and speed may be more important.

Regular visits makes planning itineraries easier.

## Stops

Refreshment breaks; connections; places of interest

Organised to help improve journeys and comfort of travellers. Keep them informed, so they can plan round them (e.g., phoning home).

## EXERCISE

Time for the next school outing: pick a destination which isn't very popular and arrange an itinerary to encourage as many people as possible to come.

# TRAVEL AND TOURISM PRODUCTS AND SERVICES

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## INVESTIGATE THE PROVISION OF TRAVEL PRODUCTS AND SERVICES

### Main Sectors of UK travel industry

#### Retail Travel

Travel agencies receive commission for acting on behalf of tour operators etc.:

- ⌘ Providing information and advice: transport etc.
- ⌘ Making bookings (e.g. guided tours)
- ⌘ Arranging insurance, currency etc.

Tour Operations put together package holidays and publish brochures:

- ⌘ Visitors to the UK (in-bound operators)
- ⌘ Travel abroad from the UK (out-bound operators)
- ⌘ Travel within the UK (domestic tour operators).

The biggest companies are Europe based, selling millions of holidays; the smallest; about a few thousand.

### Transport

Airlines: fast and efficient (unless affected by adverse weather etc.), catering for over 80% of overseas travellers; bigger planes led to lower priced package holidays. Tour operators use scheduled flights or charter flights (sub-contracted for high demand).

Ferries: vital in isolated areas, e.g. the Hebrides - the Channel Tunnel (and swifter hovercraft and hydrofoils) has affected channel ferries. Transport by water is also for pleasure; cruises are very popular.

Coach operators: about 1% of UK transport needs; cheaper and more flexible than rail. Safety precautions (set speed limits) apply; most coaches are equipped with refreshments and facilities.

Rail operators benefit car-owners (e.g. parking in city centres); enthusiasts travel for recreation. Privatisation (sometimes by coach operators) has led to criticism about inefficiency.

### Accommodation:

Hotels, furnished and serviced, can be booked overnight (couple of bedrooms or hundreds - and hundreds of staff).

Motels: sited by motorways.

Guest houses (sometimes the owner's home): few rooms, but cheaper, and popular with people who like to feel at home.

The independent opt for self-catering (sometimes big business: Hoseasons).

Holiday villages (Butlins): self-catering plus hotel amenities.

## Describing the chain of distribution

### Producers

Organisations, e.g. The Association of British Travel Agents (ABTA): set up to regulate the travel business.  
Others: transport, accommodation, excursions etc.

### Wholesalers

Tour operators: package holidays and tours (UK visitors); tours abroad, short-haul to long-haul.

### Retailers

Tour operators usually own travel agents; outlets specialising in events, e.g. in store.

## Describing products and services

Package holidays: for all customer needs, sometimes with extras: child care.

Transport bookings. Certain conditions apply, e.g. deposit. Provide information: refunds; penalties; compensation (provider making major changes).

Arranging foreign currency: convenient for customers - profitable for providers (buying is cheaper than selling); widely available: post offices, hotels etc. As is obtaining passports and visas (restricted access in certain countries, e.g., in transit): completed form; fee; proof of identity.

Accommodation: from a single room for one person to a duplex (two storey suite); catering: bed and breakfast to full board (breakfast, lunch, evening meal). Star or crown system indicates the standard of service.

## Describing sources of information

The following make further enquiries on customers' behalf.

- ⌘ Travel agencies: information about all holidays (including complaints procedure)
- ⌘ Transport providers: timetables etc., available at terminals (road, rail, air)
- ⌘ Tourist information centres: main information provider in an area: accommodation, local attractions etc.

## Matching products and services with different customers

Families want a wide choice, as in package holidays, plus extras, e.g., baby-sitting.

Individuals and groups like meeting others with similar interests. It's difficult to please every group member; even common interests mean varying degrees of involvement and expertise. While groups may be eligible for a discount, single person supplements usually apply.

Young people and senior citizens rarely have the same needs, e.g., sport - younger participants have wider choices and are looking for excitement. The more elderly tend to want to relax, rather than worrying (e.g. carting luggage around); many spend winter abroad rather than fork out for heating bills.

Special interest groups are increasing; holidays for the elderly include visiting battlefields etc.

Specific needs (besides disabilities): e.g. families with babies. Nowadays, more companies aim to make travel easier, but it's rarely cheap.



## INVESTIGATING THE PROVISION OF PRODUCTS AND SERVICES

### Different types

Tourist attractions:

Theme parks attract overseas and UK visitors. Rides may cost millions. Often custom built, some are based at stately homes.

National parks attract many people, and aim to protect the environment.

Resorts: seaside holidays are always popular - traditional break for working families; day trips.

Heritage: trips to historical sites etc. account for about one fifth of all visits.

Theatre: sometimes regarded as too expensive; information needs wide distribution, well in advance.

Accommodation and Catering: see above; proliferate in areas with tourist attractions.

Tourist boards and information centres: excellent, free sources of information.

Guiding Services (on foot, by coach etc.): help visitors to fully enjoy the experience.

Transport: see above; various means. Also, within an area.

### Cost, availability and accessibility:

- ⌘ Entertainment: a vast category. Prices vary widely; the more popular, the more people have to wait to sample something.
- ⌘ Culture (opera, classical music and ballet) often criticised: more limited appeal; expensive. 'Multi-culture', reflecting current society, is increasing, encouraging everyone to enjoy such activities.
- ⌘ Education: always associated with museums etc. Now, developed by other attractions e.g., targeting schools.
- ⌘ Information: usually free, understandably (attracting more customers), sometimes expensive e.g. specially produced souvenir booklets.
- ⌘ Relaxation: primary aim. Fresh air's free - health farms can be expensive.
- ⌘ Health: major growth area. Something for everyone (aerobics to yoga), sometimes at a price.
- ⌘ Recreation: as broad as entertainment, and with different levels; can be inexpensive.

### Customer types

Families, individuals, groups. Most facilities aim to please the majority; young and old don't always agree on activities, and may have only price concessions in common. Access: most important with specific needs and special interest groups.

## Popularity of different products and services

What appeals to most people makes more profit, but it's hard to please everybody, e.g. tradition gains because it's long-standing (local community and visitors). Novelty value: specialist interest may begin well, (media hype, enhanced by merchandising), but trends grow unfashionable. However, media ideas resulted in attractions like Disneyworld, whilst unusual sports on TV lead to facilities catering for enthusiasts.

## Describing sources of information

Tourist boards: local, regional and national. The British Tourist Authority encourages overseas visitors:

- ⌘ To come all year round
- ⌘ Make London the main destination, but see 'unspoiled' parts of the country
- ⌘ Spend loads of money.

It incorporates the English, Scottish and Wales Tourists boards: promotion; publishing annual holiday guides; providing grants to tourist businesses. The Northern Ireland Tourist Board develops and improves facilities.

Regional tourist boards: funded by the English Tourist Board, county and district councils (plus membership fees). They publish regional guides and promote the area: advertising, attending travel shows, inviting press and travel agents to visit.

Local tourist boards (districts, cities and towns): supported by local authorities.

Tourist information centres provide information, and other services e.g., bookings.

Other sources: libraries; accommodation and transport providers; guiding services (e.g., historical sites).

## INVESTIGATE LOCAL PROVISION OF TRAVEL AND TOURISM PRODUCTS AND SERVICES

### Local providers

Travel agents and tour operators: immediate area to worldwide. Tour operators: located where tourism is a leading industry. Check Yellow Pages or your library.

Tourist Attractions: List and categorise: urban, e.g. theatres and galleries; rural, e.g. parks (theme, national) heritage sites. Resorts often have several attractions. All produce publicity leaflets.

Accommodation: Back to Yellow Pages; some can't afford much advertising (e.g., guest houses), though still providing Catering for the general public: bar snacks or 'a bit of a do' (weddings etc.).

Tourist Boards and Tourist Information Centre: amount and type of work depends on the area. The latter (listed alongside tourist attractions in directories, or try the local council) provide information about guiding services e.g. boat trips.

Various Transport providers: offer details of other means.

## LOCAL SOURCES OF INFORMATION

### Local tourist boards:

- ⌘ Special events, travel (inside/outside area)
- ⌘ Basic information (timetables)
- ⌘ Useful data: future plans for the area, marketing local attractions.

Most visitors look for tourist information centres; libraries also have plenty of information.

Guiding services: run by councils (in conjunction with local bus services); private companies; stately homes. Advertised in leaflets etc.

Accommodation providers (hotel chain or single guest house) assist visitors with information about other facilities.

Transport providers: timetables; details about transport links; accommodation and attractions.

Travel agencies mainly provide information - but don't expect them to answer every query (they're running a business) or walk off with all their leaflets (or other sources').

### Describing information materials

Brochures: glossy full colour pages or a couple of photocopied sheets. Created by tour operators for local providers (booking agents), describing products and services.

Leaflets (sometimes a single page): more general, with fewer details, a sort of mini poster to attract attention to events (local, regional or national).

Timetables (national; regional; local. Residential and visitors): activities and events for planning ahead; sometimes maps. Indicate other services, rather than giving details.

## PRICES OF KEY TRAVEL AND TOURISM PRODUCTS

### Making use of information materials

Package holidays brochures use codes to calculate cost: a grid broken down into dates and number of nights, plus extra charges (sea view etc.) and discounts (four nights for three).

Transport: again, discounts and charges. Costs vary, booked directly from operators or via agencies.

Accommodation: contact actual venue; chain; tourist information centre etc. Prices depend on the quality and service required.

Attending performances/events: local press adverts and distributed leaflets give information about entrance fees (plus discounts and/or concessions, e.g. student).

Theatre bookings: made at booking offices or via agencies (also arrange West End trips etc.). Over the phone: easy way to check cost.

Guided tours: usually party discounts; leaflets in libraries etc., or contact the council or bus companies.

### EXERCISE:

Choose two local facilities, list and compare the products and services offered by each.

## IDENTIFYING THE NEEDS OF CLIENT GROUPS

### Physical activity

Everybody is used to indoor and outdoor activities (like or not) from school. Many people keep up their interests, and not just for the good of their health, but sometimes it's difficult to provide activities to suit all needs.

### Social

Fun; meeting friends and making new friends; leading to new interests; a break from work; competitive reasons.

### Intellectual

Boring chunks of daily life, particularly work, can be balanced by mental stimulation: drama etc.

### Challenge

Not only extreme sports like abseiling but fresh experiences, or improving skills. Some settle for activities they enjoy, others seek novelty.

### Satisfaction

Recreation is more fulfilling, if work or home fail to provide a boost.

### Client groups - Young and old

- ⌘ Families and Groups: majority of visitors to attractions - depending on activities available. Regular attendance: schools, clubs, organisations. NB, clubs comprise fans, while school groups include people who don't enjoy participating.
- ⌘ Clients from different cultural backgrounds: many activities across the board, especially sport. Specific interests: cultural activities (music), cooking regional dishes.
- ⌘ Disabled clients require more than access to participate as fully as possible, e.g. taking part in activities with the able-bodied, such as swimming (beneficial to health).
- ⌘ Next century: forecast that about one fifth of the population will be classed as obese; not necessarily a bar, some courses (e.g. fitness classes) are set up to cater for them.

### Suitable activities for different groups

- ⌘ Age (physical capability) affects choice of activity: children and the elderly. However, older people enjoy a wide range, and children have opportunities: simplified versions.
- ⌘ Physical condition: activities undertaken for health reasons; the more demanding may require a medical certificate.
- ⌘ Gender: usually no longer a bar (growing popularity of women's football) though still controversy: women boxers. Some activities may be unsuitable pursued to extremes, or during pregnancy.
- ⌘ Certain aspects of different cultures affect some activities (clothing, religion). Funding is usually available; a wider range of activities means people learn more about other cultures
- ⌘ Budget (facility and clients): major consideration. Swimming pools were originally free public baths, when many people didn't have bathrooms. Now, some clubs charge high rates to remain exclusive. Other charges: car parks, crèche etc., plus hiring equipment. Although modern wardrobes contain sportswear, proper clothing makes certain activities expensive.

## Benefits of recreational activities

- ⌘ Physical activities: good health and enjoyment - most popular outdoor activities (e.g., walking) and indoor (e.g., darts). Others are less common, such as pot-holing.
- ⌘ Social: entertainment, from parties to the opera. Also, team activities: meeting different people linked by common interests improves communication; increasing numbers of clubs and venues holding around 200 people.
- ⌘ Intellectual: many find learning (or teaching) makes life more interesting: using logic and strategy, satisfying curiosity.
- ⌘ Satisfaction: progress can be monitored (basic to advanced). Even experts have off days; topping a personal best is a challenge.

## Common barriers

- ⌘ Cost: see under budget.
- ⌘ Access: affecting all types of customers, including the disabled.
- ⌘ Location: sometimes a problem, especially rural areas. Facilities frequently offer only the most popular activities; those wanting anything different have to travel elsewhere. Transport problems: inconvenient timetables, finding parking spaces etc.
- ⌘ Availability: although facilities cater for demand, certain outdoor activities depend on the weather (sailing); others are restricted: weekends, particular courses etc. Multi-purpose courts: still can be used for only one, perhaps two, things at a time.
- ⌘ Lack of specialist equipment and staff: inevitably due to cost, balanced against client needs. Staff (e.g., for disabled needs) may be hired part-time, with absences, e.g. sickness, taken into account.

## Overcoming common barriers

- ⌘ Concessions: several categories, e.g. children; senior citizens; discounts: regular users.
- ⌘ Adapting facilities: use for various purposes; enlarged or made smaller (activities used concurrently). Possible problems: storing different equipment.
- ⌘ Alternative source of activities: from pubs to schools.
- ⌘ Improving transport links: joining forces with other organisations or hiring a mini-bus etc. Making an effort helps guarantee customer loyalty.
- ⌘ Adapting the programme: flexibility, making changes to satisfy customer needs.
- ⌘ Specialist equipment and staff: split costs with neighbouring organisations? Securing or raising funds may be required.

# INVESTIGATING RECREATIONAL ACTIVITIES

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## SURVEYING PARTICIPATION IN LOCAL RECREATIONAL ACTIVITIES

### Provision

Local activities; which groups most use them

List all types of activities, to pick the most suitable centre for a survey:

- ⌘ When are they available: night-time; weekends; seasonally; depending on weather conditions? Study timetables.
- ⌘ Location: town or country; access problems; residents; visitors.

Identifying main client groups

See above; match with the different activities.

Identifying main characteristics to help illustrate possible barriers:

- ⌘ Age and physical condition
- ⌘ Gender
- ⌘ Culture
- ⌘ Budget.

The latter has a wide-reaching effect. Privately owned centres are expensive; council run are cheaper, benefiting the community.

Describing use by different client groups

Facilities keep records about the type of activity, to compile data about client use, availability etc.

Members, or those using the centre with the greatest frequency, expect value for money. They may pursue one activity, or a variety, and like the opportunity to try different things. Information helps facilities prioritise outlay, putting it to the best use.

Time spent in activities: one hour class, to matches. This, plus differing numbers of participants, can make calculations difficult.

Identifying benefits and barriers; explaining how to overcome the latter

Interviewing different clients will ascertain benefits, whilst any complaints account for barriers, as will speaking to people who don't use the centre.

Finding out about problems is the first step to overcoming them:

- ⌘ No crèche
- ⌘ Unreliable bus service
- ⌘ Too expensive (unemployed).

Also, some people participate in certain activities just for fun and find it irritating when others take it too seriously, and vice versa.

### EXERCISE

Pick two contrasting groups (children, elderly; novice, experts) and list suitable recreational activities for both, plus likely barriers.