
OCR GCSE IN LEISURE AND TOURISM (DOUBLE AWARD) (1495)

Foreword

This pack contains OCR's GCSE in Leisure and Tourism (Double Award) Specification for teaching from September 2002.

First certification will be available in June 2004 and every January and June thereafter.

This specification is approved by QCA, ACCAC and CCEA as a qualification covering Levels 1 and 2 of the National Qualifications Framework.

Qualification Accreditation Number 100/1972/8

Key Features

- A new broad-based qualification in Leisure and Tourism, equivalent to two GCSEs.
- Suitable for pre- and post-16 candidates of a wide ability range, studying either full- or part-time.
- Overall assessment based on two internally assessed portfolio units and one externally examined unit.
- Written paper available in January and June.
- Portfolio Assessment available in January and June.
- A balanced spread of content, covering the role of the leisure and travel and tourism industries in society, marketing and customer service.
- Enables candidates to develop a valuable insight into how leisure and tourism businesses operate via investigation and practical classroom activities set in an appropriate vocational context.
- No prior knowledge of this vocational area is required.
- Provides a progression route to further education or employment within this broad and increasingly important economic sector.
- A natural successor to the popular Part One GNVQ.
- Opportunities for developing Key Skills are identified in the specification.
- Supported by OCR approved Heinemann Texts.

Contents

Specification Summary	4
1 Introduction	5
1.1 Rationale	5
1.2 Certification Title	6
1.3 Level of Qualification	7
1.4 Specification Aims	7
1.5 Assessment Objectives	8
1.6 Recommended Prior Learning	8
1.7 Progression	9
1.8 Related Qualifications	9
1.9 Spiritual, Moral, Ethical, Social and Cultural Issues	10
1.10 Citizenship	12
1.11 Environmental Issues	12
1.12 The European Dimension	13
1.13 Health and Safety	13
1.14 Status in Wales and Northern Ireland	14
2 Scheme of Assessment	15
2.1 Nature of Assessment	15
2.2 Units	15
2.3 Portfolio Assessment	15
2.4 External Assessment	20
2.5 Administrative Arrangements	21
2.6 Grade Descriptions	22
2.7 Awarding and Reporting	23
2.8 Special Arrangements	24
2.9 Results Enquiries and Appeals	25

3	Further Information and Training for Teachers	26
4	Key Skills Guidance	27
5	Specification Units	39
6	Unit 1: Investigating Leisure and Tourism	41
6.1	About this Unit	41
6.2	What You Need to Learn	42
6.3	Guidance for Teachers	46
7	Unit 2: Marketing in Leisure and Tourism	51
7.1	About this Unit	51
7.2	What You Need to Learn	51
7.3	Assessment Evidence for Unit 2: Marketing in leisure and tourism	56
7.4	Guidance for Teachers	58
8	Unit 3: Customer Service in Leisure and Tourism	65
8.1	About this Unit	65
8.2	What You Need to Learn	65
8.3	Assessment Evidence for Unit 3: Customer service in leisure and tourism	70
8.4	Guidance for Teachers	72

Specimen Assessment Materials are included after this specification.

Specification Summary

SCHEME OF ASSESSMENT

Candidates will study the following **three** mandatory units.

Unit	Title	Type of Assessment	Entry Code	Weighting
1	Investigating leisure and tourism	External	4875	33.33%
2	Marketing in leisure and tourism	Portfolio	4876	33.33%
3	Customer Service in leisure and tourism	Portfolio	4877	33.33%

TIERS

The scheme of assessment consists of one tier covering the whole of the ability range grades A*A* to GG. Candidates achieving less than the minimum mark for grade GG will be unclassified.

INTERNAL ASSESSMENT

All candidates take Units 2 **and** 3.

EXTERNAL ASSESSMENT

All candidates take Unit 1. This unit is assessed through an externally set paper.

The paper comprises structured questions and will be one and a half hours in length. Candidates attempt **all** questions.

AVAILABILITY

External assessment is available every January and June from January 2004.

Portfolio moderation is available every January and June from January 2004. Centres wishing to receive earlier feedback or advice on coursework may arrange with OCR to contact a Portfolio Consultant.

First certification will be available in June 2004 and every January and June thereafter.

1 Introduction

1.1 RATIONALE

This specification leads to a GCSE in Leisure and Tourism (Double Award) which covers both Levels 1 and 2 (Foundation and Intermediate Levels) of the National Framework of Qualifications and has been designed to raise attainment at these levels. Candidates study **three** units which provide a broad introduction to a wide range of vocational issues.

The specification builds upon the broad educational framework set out in the criteria for GCSEs in vocational subjects from the Qualifications and Curriculum Authority. GCSEs in vocational subjects are broad based vocational qualifications designed to widen participation in vocationally-related learning pre-16 and to encourage post-16 candidates to try a vocationally-related course where maybe another programme has previously not proved appropriate for them.

GCSEs in vocational subjects have been designed to contribute to the quality and coherence of national provision. They have been developed following widespread consultation by QCA in the autumn of 2000 and are based on Part One GNVQs which received positive Ofsted reports. GCSEs in vocational subjects have a clear place in the Government's vision for secondary education for the next ten years.

The GCSE in Leisure and Tourism (Double Award) has been designed to form a qualification which provides the technical knowledge, skills and understanding associated with the subject at these levels so as to equip candidates with some of the skills they will need in the workplace or in further education or training. It allows candidates to experience vocationally-related learning so as to enable them to decide if it is suitable for them.

A GCSE in Leisure and Tourism (Double Award) is an ideal qualification for those candidates who want a broad background in Leisure and Tourism and the course of study prescribed by this specification can reasonably be undertaken by candidates entering this vocational area for the first time. It is designed to enable candidates to make valid personal choices upon completion of the qualification and to progress to further education, training or employment. It provides a suitable basis for further study in this subject or for related courses which could include GNVQs, VCEs, GCEs, NVQs or Modern Apprenticeships. It is designed to be delivered in full-time or part-time education.

Examples of appropriate employment to which a GCSE in Leisure and Tourism (Double Award) candidate might progress include operational level or trainee positions in a range of organisations belonging to the leisure and tourism industry such as recreational assistant in a leisure centre, trainee travel agent, receptionist in a conference centre or sales assistant in a cinema.

Key Skills are integral to the specification and opportunities to provide evidence for the separate Key Skills qualification are signposted.

The fundamental philosophy of this specification is to enable candidates to:

- develop an understanding of how people spend their leisure time and how the leisure industry meets their needs;
- discover the reasons for people travelling and to study the most popular UK leisure and tourism destinations;
- develop an awareness of how leisure and tourism organisations operate as businesses through exploration of such concepts as marketing and customer service.

The GCSE in Leisure and Tourism (Double Award) has been designed to provide a range of teaching, learning and assessment styles to motivate candidates to achieve the best they can and to empower them to take charge of their own learning and development. Assessment is designed to give credit for what candidates can do as well as what they know. It is based both on portfolio evidence from assignments, set and assessed by the Centre and moderated by OCR, and an external assessment, which is set and marked by OCR.

This specification is supported by users who ‘*would like to support the aims of the new GCSE in Leisure and Tourism (Double Award) as proposed by OCR*’ and who feel that these proposals ‘*should ensure a continued high standard that can be trusted by schools and employers alike*’. This specification is also supported by a range of professional institutes and Further and Higher Education Institutions including TTNT0 (Travel and Tourism) and Sports and Recreation NTO, the national training organisations for this vocational area.

‘These proposals should ensure a continued high standard that can be trusted by the schools and employers alike.’

Rhys Guthrie, Assistant Head Teacher, Southfield Technology College

‘I believe that the new course will be valuable to candidates as it will combine the vocational element with the GCSE qualification..... the new grading system, which will match GCSE grades, will make comparisons easier for all concerned.’

Valerie Lawton, GNVQ Leisure and Tourism Co-ordinator, Royds School

OCR has taken great care in the preparation of this specification and assessment material to avoid bias of any kind.

1.2 CERTIFICATION TITLE

This specification will be shown on a certificate as:

OCR GCSE in Leisure and Tourism (Double Award).

1.3 LEVEL OF QUALIFICATION

This qualification is approved by QCA at Levels 1 and 2 of the National Qualifications Framework.

Candidates who gain grades GG to DD will have achieved an award at Level 1.

Candidates who gain grades CC to A*A* will have achieved an award at Level 2.

This qualification is of a standard which is broadly equivalent to two GCSEs at grades G to A*.

1.4 SPECIFICATION AIMS

The aims of this specification are to encourage candidates to:

- develop an understanding of how leisure and tourism organisations operate as businesses;
- acquire knowledge and understanding of UK travel and tourism activities and destinations;
- develop an understanding of how people spend their leisure time;
- develop an understanding of how the leisure industry meets people's needs;
- develop an understanding of why people travel and how the tourism industry meets their needs;
- develop an understanding of employment possibilities in leisure and tourism;
- develop an understanding of how leisure and tourism organisations market the products and services they offer;
- develop an understanding of the importance of customer service in leisure and tourism organisations.

To this end, the specification encourages courses which will:

- provide a broad background of understanding and core knowledge of the leisure and tourism industries in the UK;
- encourage a candidate-centred approach to learning together with the opportunity to apply knowledge of the leisure and tourism industries in a vocationally relevant way;
- provide Centres with the opportunity to forge links with leisure and tourism businesses;
- foster cross-sector themes and approaches so that candidates can gain an insight into related sectors, such as business, retail and distribution and hospitality and catering;
- provide opportunities for progression into employment into the leisure and tourism industries or higher level vocational qualifications in these or related sectors.

1.5 ASSESSMENT OBJECTIVES

Candidates for this qualification will be expected to demonstrate their ability to:

- AO1 show knowledge and understanding of the specified content in a range of vocationally-related situations;
- AO2 apply the knowledge, skills and understanding specified in the subject content in a range of vocationally-related situations;
- AO3 plan and carry out investigations and tasks in which they examine vocationally-related issues and problems, gather, record and analyse relevant information and evidence and evaluate evidence, make reasoned judgements and present conclusions.

The weightings for the assessment objectives over the whole qualification are:

AO1	26%
AO2	28%
AO3	46%

The weightings for the assessment objectives per unit are:

	Unit 1	Unit 2	Unit 3
AO1	48%	14%	16%
AO2	24%	30%	30%
AO3	28%	56%	54%
	100%	100%	100%

1.6 RECOMMENDED PRIOR LEARNING

Candidates entering this course should have achieved a general educational level equivalent to Entry Level 3 in the National Qualifications Framework, or Level 3 of the National Curriculum.

Prior learning, skills and aptitudes particularly relevant include:

- basic proficiency in literacy;
- basic proficiency in numeracy;
- some aptitude for ICT;
- some motivation to work independently.

There is however no prior knowledge required for this specification.

1.7 PROGRESSION

1.7.1 Progression into Employment

This specification is designed to enable candidates to enter employment at operative or technician level within a wide range of leisure and tourism environments. Such candidates may enter employment through a work-related training programme.

The leisure and tourism sector is an important and fast growing area of employment and the well developed personal skills (e.g. initiative, teamwork, problem-solving) combined with work-related knowledge gained within a GCSE in Leisure and Tourism (Double Award) means that candidates are particularly suitable for recruitment in a range of employment categories, e.g. recreational assistant in a leisure centre, trainee travel agent, receptionist in a conference centre or sales assistant in a cinema.

1.7.2 Progression to Further Qualifications

Candidates who achieve this qualification at Level 1 may wish to continue to courses such as a GNVQ award or NVQ Sport and Recreation or NVQ Travel Services at Level 1, or, if suitably qualified in other areas, could progress to courses such as Intermediate GNVQ in Leisure and Tourism or NVQ Sport and Recreation or NVQ Travel Services at Level 2.

Candidates who achieve this qualification at Level 2 may wish to continue to courses such as an Intermediate GNVQ award or NVQ Sport and Recreation or NVQ Travel Services at Level 2, or, if suitably qualified in other areas, could progress to courses leading to the VCE in Leisure and Recreation or Travel and Tourism or NVQ Sport and Recreation or NVQ Travel Services at Level 3.

A GCSE (Double Award) qualification may also be considered as equivalent to two GCSEs at grades A* to G for the purposes of admission to other level courses within the National Qualifications Framework, including GCSEs in other vocational areas.

1.8 RELATED QUALIFICATIONS

1.8.1 GCSEs/GNVQs

The units of this qualification have a significant overlap of content with the OCR GNVQ in Leisure and Tourism.

The content of the three units of the GCSE in Leisure and Tourism (Double Award) is very similar to that of Units 1, 2 and 3 of the six-unit GNVQs in Leisure and Tourism.

1.8.2 Relationship to NVQs

This specification broadly introduces the candidate to skills relevant to Sport and Recreation, Travel Services and Customer Service NVQs, though the assessment methods are not designed to guarantee occupational competence. However, this qualification will support candidates working towards National Occupational Standards, detailed guidance for which will be issued by QCA in early 2002.

1.8.3 Exclusions

Every specification is assigned to a national classification code indicating the subject area to which it belongs.

Due to overlap of content, there are restrictions on entering candidates for the following qualifications: GNVQ Leisure and Tourism (Foundation or Intermediate); GCSE Travel and Tourism. Such restrictions, if not prevented at the point of entry, will be picked up both when funding is calculated and when results leading to points towards performance tables are aggregated, as all of the above qualifications will have the same classification code and so be discounted for funding and performance table purposes.

1.9 SPIRITUAL, MORAL, ETHICAL, SOCIAL AND CULTURAL ISSUES

Leisure and tourism offers a wide range of opportunities for the exploration of spiritual, moral, ethical, social and cultural issues.

The specification includes a range of interconnected themes which allow teachers and candidates to explore their implications. Candidates are encouraged to understand and discuss the implications of decisions that may influence communities, populations and individuals. Implicit in much of the work is the recognition that the growth of travel and tourism and recent trends in how people spend their leisure time often has moral, ethical and social parameters.

Candidates should show knowledge and awareness that society is made up of individuals with a variety of opinions and needs. Candidates should be familiar with the concept that differing values and attitudes exist and they should reflect on these and on their own beliefs. They should be aware that differences in society may lead to conflicts of interest and these can be explored through the study of the impact of tourism in Unit 1: *Investigating leisure and tourism* which explores the conflict between improvements in living standards and the possible negative effects on the environment and local culture for a country. Similarly in Unit 1, when looking at the factors that influence people's choices about how to use their leisure time, an opportunity is provided for candidates to learn about the links between lifestyle, exercise and health.

Legal issues are addressed in each unit, where appropriate.

Signposting

The purpose of the following table is to signpost further possible opportunities for delivering Spiritual, Moral, Ethical, Social and Cultural (SMESC) related issues.

Key:

Sp Spiritual **M** Moral **E** Ethical **So** Social **C** Cultural

Unit	Content	Sp	M	E	So	C
1	<ul style="list-style-type: none"> The role of leisure and tourism in society today introduces So. The make up of the different visitors will bring into consideration Sp C. 	*			*	*
2	<ul style="list-style-type: none"> Marketing principles in covering the marketing/advertising of products/services will bring into the debate M and E aspect in that the promotion of a given product/service should be in no way misleading. Concepts of market research and what the collected data can be used for: E Target marketing: So C. This may be extended to include Sp which may have resonance when considering imagery/promotional techniques and which are most likely to work in attracting certain groups of people. 	*	*	*	*	*
3	<ul style="list-style-type: none"> Customer service and meeting the need of customers: Sp So C. Complaints and returns policies: M E. These factors may also be covered when meeting specific needs of customers, e.g. those with special needs. Communicating with customers (e.g. some cultures consider it rude not to maintain eye contact and vice versa): Sp C. 	*	*	*	*	*

1.10 CITIZENSHIP

From September 2002, the National Curriculum for England at Key Stage 4 includes a mandatory programme of study for Citizenship. Parts of this programme of study may be delivered through an appropriate treatment of other subjects.

This section offers guidance on opportunities for developing knowledge, skills and understanding of citizenship throughout the course.

Signposting

The purpose of the following table is to signpost possible opportunities for delivering Citizenship related issues.

Unit	Content
1	<ul style="list-style-type: none">Eco-tourism. This can be linked to destinations (e.g. preservation orders on pathways in the Lake District), or to fuel consumption (e.g. public versus private transport).
2	<ul style="list-style-type: none">Target marketing and promotional tools, suitable or given lifestyles.
3	<ul style="list-style-type: none">Personal presentation and handling complaints: how to deal with and respond to people in an appropriate manner, act according to given standards and codes.

1.11 ENVIRONMENTAL ISSUES

OCR has taken account of the 1988 Resolution of the Council of the European Community and the Report *Environmental Responsibility: An Agenda for Further and Higher Education*, 1993 in preparing this specification and associated specimen assessments.

Unit 1: *Investigating leisure and tourism* is specifically designed to consider the environmental issues associated with the impacts of tourism.

Signposting

The purpose of the following table is to signpost further possible opportunities for delivering environment related issues.

Unit	Content
1	<ul style="list-style-type: none">Environmental concerns and the notion of eco-tourism. This can be linked to destinations (e.g. preservation orders on pathways in the Lake District) and to fuel consumption (e.g. public versus private transport).
2	<ul style="list-style-type: none">None.
3	<ul style="list-style-type: none">None.

1.12 THE EUROPEAN DIMENSION

OCR has taken account of the 1988 Resolution of the Council of the European Community in preparing this specification and associated specimen assessments. European examples should be used where appropriate in the delivery of the subject content. Relevant European legislation is identified within the specification where applicable.

Whilst at this level, local and national issues will predominate, teachers are expected to take appropriate opportunities to consider issues in the European context.

Unit 1: *Investigating leisure and tourism* whilst concentrating on the leisure and tourism industry in the UK provides an opportunity to consider in-bound and out-bound tourism.

Signposting

The purpose of the following table is to signpost further possible opportunities for delivering European related issues.

Unit	Content
1	<ul style="list-style-type: none">• Consideration of different transport routes may introduce a European element in the form of legislation governing transport and transport links. The European element may be further developed by consideration of the legislation detailing the need for suitably qualified instructors.
2	<ul style="list-style-type: none">• Marketing principles will introduce a legal framework, therein a European element, in covering the marketing/advertising of products/services.• Market research and what the collected data can be used for.
3	<ul style="list-style-type: none">• Complaints and returns policies. May also be covered when meeting specific needs of customers, e.g. those with special needs.• Data protection issues when keeping customer records.

1.13 HEALTH AND SAFETY

Candidates are introduced to health and safety issues in the context of this sector and should be made aware of the significance of safe working practices.

Health and safety issues should pervade the teaching of all units.

1.14 STATUS IN WALES AND NORTHERN IRELAND

This specification has been approved by ACCAC for use by Centres in Wales and by CCEA for use by Centres in Northern Ireland.

Candidates in Wales or Northern Ireland should not be disadvantaged by terms, legislation or aspects of government that are different from those in England. Where such situations might occur, including in the external assessment, the terms used have been selected as neutral, so that candidates may apply whatever is appropriate to their own situation.

OCR will provide specifications, assessments and supporting documentation in English. Further information concerning the provision of assessment materials in Welsh and Irish may be obtained from the Information Bureau at OCR (telephone 01223 553998)¹.

¹ The OCR Information Bureau is open to take your calls between 8.00am and 5.30pm. Please note that as part of our quality assurance programme your call may be recorded or monitored for training purposes.

2 Scheme of Assessment

2.1 NATURE OF ASSESSMENT

The assessment will be conducted in accordance with the GCSE, GCE, VCE and GNVQ Code of Practice. Two units will be assessed internally, through a teacher-assessed portfolio (see Section 2.3) and one unit will be assessed externally with the assessment set and marked by OCR (see Section 2.4). All internal assessment will be moderated by OCR.

2.2 UNITS

The content of each unit, together with detailed assessment evidence requirements, is described in Sections 5 to 8.

Candidates will study the following **three** mandatory units.

Unit	Title	Type of Assessment	Entry Code	Weighting
1	Investigating leisure and tourism	External	4875	33.33%
2	Marketing in leisure and tourism	Portfolio	4876	33.33%
3	Customer Service in leisure and tourism	Portfolio	4877	33.33%

External assessment is available every January and June from January 2004.

Portfolio moderation is available every January and June from January 2004.

First certification will be available in June 2004 and every January and June thereafter.

2.3 PORTFOLIO ASSESSMENT

2.3.1 Supervision and Authentication of Portfolios

OCR expects teachers to supervise and guide candidates who are producing portfolios. The degree of teacher guidance in candidates' work will vary according to the kind of work being undertaken. However, it should be remembered that candidates are required to reach their own judgements and conclusions.

When supervising candidates, teachers are expected to:

- offer candidates advice about how best to approach their tasks;
- exercise continuing supervision of work in order to monitor progress and to prevent plagiarism;
- ensure that the work is completed in accordance with the specification requirements and can be assessed in accordance with the specified marking criteria and procedures.

Work on portfolios may be undertaken outside the Centre and in the course of normal curriculum time. As with all internally assessed work, the teacher must be satisfied that the work submitted for assessment is the candidate's own work. This does not prevent groups of candidates working together in the initial stages, but it is important to ensure that the individual work of a candidate is clearly identified separately from that of any group in which they work.

Throughout the course, the teacher should encourage the candidate to focus on achieving the criteria listed in the *Assessment Evidence Grids*. Teachers may set internal deadlines for candidates submitting work to them. Teachers may comment on a candidate's unit portfolio and return it for redrafting without limit until the deadline for the submission of marks to OCR. Internal Assessors must record details of any assistance given and this must be taken into account when assessing candidates' work. Once the mark for the unit portfolio has been submitted to OCR, no further work may take place.

2.3.2 Production and Presentation of Portfolios

Candidates must observe the following when producing portfolios:

- Any copied material must be suitably acknowledged.
- Quotations must be clearly marked and a reference provided wherever possible.
- Work submitted for moderation must be marked with the:
 - Centre number;
 - Centre name;
 - candidate number;
 - candidate name;
 - specification code and title;
 - unit code.
- Centres must complete the appropriate Assignment/Unit Recording Sheet in full and attach it to each piece of work sent for moderation.

2.3.3 Administering Portfolio Assessment

OCR will conduct all administration of the GCSEs in vocational subjects through the Examination Officer at the Centre. Teachers are strongly advised to liaise with their Examination Officer to ensure that they are aware of key dates in the administrative cycle.

Assessment Record materials, including full details of administrative arrangements for portfolio assessment, will be forwarded to Examination Officers in Centres in Autumn 2002, following receipt of provisional entries. At the same time the materials will be made available within the Teacher's Guide and on the OCR website (www.ocr.org.uk). The materials will include master copies of mandatory forms on which to record assessments and will also include optional recording materials for the convenience of Centres. Forms may be photocopied and used as required.

The Assessment Evidence Grids

Centres are required to carry out internal assessment of portfolios using the *Assessment Evidence Grids* in accordance with OCR procedures. The process of using these grids is described in Section 2.3.4. Candidates' marks are recorded on these grids. One grid should be completed for each candidate's unit portfolio. These grids should be attached to the front of the candidate's portfolio for the unit when sent to the Moderator.

When candidates are given their assignments, they should also be issued with a reference copy of the appropriate *Assessment Evidence Grid*.

Candidates' portfolios should be clearly annotated to demonstrate where, and to what level, criteria have been achieved. This will help in the moderation process. If teachers do this well it will be very much in the interests of their candidates. On completion of a unit, the teacher must complete the *Assessment Evidence Grid* and award a mark out of 50 for the unit. Details of this process are described in Section 2.3.4.

Internal Standardisation

It is important that all internal assessors, working in the same subject area, work to common standards. Centres are required to ensure that internal standardisation of marks across assessors and teaching groups takes place using an appropriate procedure.

This can be done in a number of ways. In the first year, reference material and OCR training meetings will provide a basis for Centres' own standardisation. In subsequent years, this, or Centres' own archive material, may be used. Centres are advised to hold a preliminary meeting of staff involved to compare standards through cross-marking a small sample of work. After most marking has been completed, a further meeting at which work is exchanged and discussed will enable final adjustments to be made.

Submission of Marks to OCR

The involvement of OCR begins on receipt of entries for the portfolio unit from a Centre's Examinations Officer. Entries for units to be included in the January assessment session must be made by the published entry date in October. Entries for units to be included in the Summer assessment session must be made by the published entry date in March. Late entries attract a substantial penalty fee.

By an agreed internal deadline the teacher submits the marks for the unit to the Examinations Officer. Marks will need to be available by the portfolio mark submission dates published by OCR and internal deadlines will need to reflect this. OCR will supply Centres with *MSI Internal Assessment Mark Sheets* to record the marks and instructions for completion. It is essential that Centres send the top copy of these completed forms to OCR, the second copy to the Moderator and keep the third copy for their own records.

Moderation

Moderation will take place by post in January and June. Shortly after receiving the marks, the Moderator will contact the Centre and inform them of the sample of candidates' work that will be required, as outlined in Section 2.3.5.

2.3.4 Applying the Assessment Criteria

Sources of Guidance

The starting point in assessing portfolios is the *Assessment Evidence Grid* within each unit. These contain levels of criteria for the skills, knowledge and understanding that the candidate is required to demonstrate. The *Guidance for Teachers* within the unit expands on these criteria and clarifies the level of achievement the assessor should be looking for when awarding marks.

Before the start of the course OCR will produce a *Handbook for Teachers*. At Inset sessions in the autumn term OCR will provide examples of candidates' work which help to exemplify standards at grades AA, CC and FF that have been agreed with QCA and the other Awarding Bodies.

In the Autumn and Spring terms OCR will hold training meetings on portfolio assessment led by senior GCSE Moderators. Details of these are in the OCR INSET booklets which are sent to Centres in the Summer term or they may be obtained from the Training and Customer Support Division on 01223 552950. They are also published on the OCR website (www.ocr.org.uk).

OCR also operates a network of Portfolio Consultants. Centres can obtain advice on assessment of portfolios from an OCR Portfolio Consultant. These are both subject specialists and senior Moderators. Details of these may be obtained from the OCR Subject Officer.

Determining a Candidate's Mark

Each unit portfolio should be marked by the teacher according to the criteria in the *Assessment Evidence Grid*. Each row in the grid comprises a strand showing the development of a given criterion and corresponds to a point (a, b, c etc.) in the banner.

Each column describes the work undertaken by a candidate working within a range of grades. The criterion in the first column describes typical attainment of a candidate working within the range of grades GG to EE. The second column describes the work of a typical candidate working at grades DD, CC and the lower half of grade BB whilst the third column describes the work of a typical candidate working at the upper half of grade BB, grades AA and A*A*.

The maximum mark for that strand is shown in the right hand column.

Teachers use their professional judgement and circle the mark that *best fits* the work of the candidate and also records it in the column headed *Mark*.

Centres should use the full range of marks available to them; Centres must award *full* marks in any band for work which fully meets the criteria. This is work which is ‘the best one could expect from candidates working at GCSE (Double Award) level’.

Only one mark per strand/row will be entered. The final mark for the candidate is out of a total of 50 and is found by totalling the marks for each strand.

Centres may find it helpful to use the assessment criteria holistically when initially assessing candidates’ work. The outcome can then be compared with the final grade awarded through the procedure outlined above. If these differ, an explanation should be sought and the differences resolved.

2.3.5 Portfolio Moderation

After the unit portfolio is internally marked by the teacher and marking has been internally standardised, marks are submitted to OCR by a specified date, published in the Key Dates poster, after which moderation takes place in accordance with OCR procedures.

The purpose of moderation is to ensure that the standard of the award of marks for internally assessed work is the same for each Centre and that each teacher has applied the standards appropriately across the range of candidates within the Centre.

It is essential that the rank order of marks supplied to a Moderator is correct. If Centre assessment is inconsistent, work will be returned to the Centre for re-assessment.

The sample of work which is presented to the Moderator for moderation must show how the marks have been awarded in relation to the marking criteria defined in the unit.

Moderation for all units will be available in the January and June sessions.

Principles of Moderation

The following principles, agreed by the Awarding Bodies and QCA, indicate, in broad terms, how portfolio units will be moderated. OCR has detailed procedures that Moderators will follow to implement the moderation process.

Centres submit unit marks to OCR and to the Moderator by the specified OCR submission date.

The Moderator will select a sample of candidates from each unit, whose portfolios cover a range of grades.

If the work seen overall has been assessed accurately and consistently to agreed national standards, within agreed tolerances, all unit marks submitted by the Centre are accepted with no adjustments.

Adjustments, where required, will be carried out by OCR using its normal procedure. Centres are not required to amend marks except if administrative issues, errors or order of merit problems are discovered.

Whilst Moderators may seek clarification from a Centre, they cannot negotiate portfolio marks in any way. OCR will inform Centres of the outcome of the moderation process at the time of publication of results. This will include a written report on any significant issues that arose during this process.

The following principles, agreed by the Awarding Bodies and QCA, indicate, in broad terms, how portfolio units will be moderated. OCR has detailed procedures that Moderators will follow to implement the moderation process.

Centres submit unit marks to OCR and to the Moderator by the published OCR submission date.

The Moderator will select from each unit, a sample of candidates' portfolios which cover a range of grades.

If the work seen overall has been assessed accurately and consistently to agreed national standards, within agreed tolerances, all assessment unit marks submitted by the Centre are accepted with no adjustments.

Adjustments, where required, will be carried out by OCR using its normal procedure. Centres are not required to amend marks except if administrative issues, errors or order of merit problems are discovered.

Whilst Moderators may seek clarification from a Centre, they cannot negotiate portfolio marks in any way. OCR will inform Centres of the outcome of the moderation process at the time of publication of results. This will include a written report on any significant issues that arose during this process.

2.4 EXTERNAL ASSESSMENT

2.4.1 Tiering

The scheme of assessment consists of one tier covering the whole of the ability range grades A*A* to GG. Candidates achieving less than the minimum mark for grade GG will be unclassified.

2.4.2 Nature of External Assessment

OCR has designed external assessments which allow candidates to apply the knowledge and understanding they have gained from teacher-designed activities and assignments based on the *What You Need to Learn* section of the units.

It should be emphasised that unit delivery should not be focused on preparing candidates solely for the external assessment with the result that wider learning opportunities are missed. The external assessment forms only a small proportion of the learning within the unit but the grade achieved through it is based on the GNVQ approach to learning which involves practical work, assignments and independent research.

Specimen assessment material is included with this specification.

2.4.3 Re-sits

Candidates will be permitted to re-sit each assessment unit once only with the better mark counting towards the final grade. Candidates may, however, retake the whole qualification more than once. For the purposes of the re-sit rule, it is the results of, not the entry for, a unit that counts.

The shelf life of assessment unit results is limited only by the shelf life of the qualification.

2.5 ADMINISTRATIVE ARRANGEMENTS

All administrative arrangements regarding entries, submission of marks, moderation, receipt of results documentation etc. are to be made through Examinations Officers.

Please note that it is very important for Examinations Officers to register provisional entries for Centres since this is the mechanism which triggers the issue of assessment recording materials and pre-release materials etc. to Centres.

2.5.1 Unit and Certificate Entries

Note that entry for units will *not* generate a final certificate – a separate certification entry for code 1495 must be made. This will usually be along with the final unit entries.

A candidate who has completed all the units required for a qualification may enter for certification at a later examination series. For example, a candidate who has completed all the required units but who has not entered for certification may do so in the *same* examination series within a specified period after the publication of results.

First certification will be available in June 2004 and every January and June thereafter.

2.5.2 Unit Availability

External assessment is available every January and June from January 2004.
Portfolio moderation is available every January and June from January 2004.

2.5.3 Moderation Arrangements

Portfolio moderation is offered in January and June. Centres wishing to receive earlier feedback or advice on coursework may arrange with OCR to contact a Portfolio Consultant.

Centres submit unit marks to OCR and to the Moderator by the published OCR submission date.

2.5.4 Issue of Results

Individual assessment unit Statement of Results will be issued for all units (both portfolio units and external units) and will include, for each unit, the unit title, the unit UMS mark, information enabling UMS marks to be equated to GCSE (Double Award) grades and the date the unit was taken.

Candidates must be entered for certification code 1494 to claim their overall grade.

Note that entry for units will *not* generate a final certificate – a separate certification entry must be made at the appropriate time.

Certificates will include an explanatory note on the nature of double awards.

2.5.5 Fresh Start

To cater for candidates who need to restart a qualification, the Centre may request that all previous unit results relating to that qualification should be deleted. For example, a candidate may wish to make a *fresh start* after a period spent out of education. In such cases, OCR will use its discretion to decide whether such a request can be granted, given the time-scales involved and the need to uphold the integrity of the re-sit rules outlined above. Such requests will not normally be granted for whole cohorts of candidates.

2.6 GRADE DESCRIPTIONS

The following grade descriptions indicate the levels of attainment characteristic of the given grade for this GCSE (Double Award). They give a general indication of the required standard at each specified grade. The descriptions should be interpreted in relation to the content and assessment evidence requirements outlined in the specification; they are not designed to define that content. The grade awarded will depend in practice upon the extent to which the candidate has met the assessment evidence requirements overall. Shortcomings in some aspects of the assessment may be balanced by better performances in others.

Grade FF candidates will show a basic knowledge and understanding of the nature of the leisure and tourism industries and the terms and concepts relating to the leisure and tourism industries. They will sometimes apply their knowledge, skills and understanding in vocationally-related situations. They will select some relevant information from more than one source and show some ability to organise it appropriately. They will comment on the evidence and data studied and suggest simple, broadly relevant explanations. They will include a few appropriate examples of illustrations and non-written data which are broadly related to the question or assignment set. They will reach straightforward conclusions, which may not be clearly presented.

Grade CC candidates will show a sound knowledge and understanding of the nature and characteristics of the leisure and tourism industries and the terms and concepts relating to the leisure and tourism industries. They will apply relevant knowledge, skills and understanding in a range of vocationally-related situations. They will select mainly relevant information from several sources and show a reasonable ability to organise it appropriately. They will comment in some depth on the evidence and data studied, show a clear understanding of the issues involved and suggest relevant explanations. They will include a reasonable proportion of illustrations and non-written data which are clearly related to the question or assignment set and generally support their conclusions. They will reach reasoned conclusions, which are usually clearly presented.

Grade AA candidates will show a detailed knowledge and thorough understanding of the nature and characteristics of the leisure and tourism industries and the terms and concepts relating to the leisure and tourism industries. They will apply appropriate knowledge, skills and understanding in a wide range of vocationally-related situations. They will consistently select relevant information from a wide variety of sources and show a high level of skill in organising it accurately and appropriately. They will consistently analyse and evaluate the evidence and data studied. They will show a high level of skill in organising information accurately and appropriately. They will show a thorough understanding of the issues relating to the leisure and tourism industries and are able to offer accurate and reasoned explanations. They will include an appropriate proportion and variety of illustrations and non-written data which are clearly related to the question or assignment set and significantly enhance their conclusions. They will reach substantiated conclusions, which are consistently clearly presented.

2.7 AWARDING AND REPORTING

A new section of the Code of Practice, for GCSE (Double Award) qualifications, is to be introduced in September 2002. The qualifications will comply with the grading, awarding and certification requirements of this section of the Code of Practice.

A uniform mark scale (UMS) will be used to aggregate individual assessment units to generate qualification grades.

2.7.1 Unit Grades

Teachers assess each portfolio unit and award a raw score on a scale of 0-50. The evidence required to support the award of marks is given in the *Assessment Evidence* section of each unit. The OCR awarding committee will consider portfolios and will determine the grade thresholds for each unit.

The following table indicates the notional thresholds for the unit, but these are subject to adjustment by the awarding committee.

Grade	A*A*	AA	BB	CC	DD	EE	FF	GG
Mark	45	40	35	30	25	20	15	10

The externally assessed unit will be marked by OCR. The maximum raw score will be stated on the front cover of the question paper.

2.7.2 Uniform Marks

Once the raw score for each unit has been established, it will be converted by OCR and reported to candidates as a Uniform Mark out of 100.

Uniform marks correspond to *unit* grades as follows:

	A*A*	AA	BB	CC	DD	EE	FF	GG
UMS (max 100)	90	80	70	60	50	40	30	20

Candidates who fail to achieve the standard for a grade GG will be awarded a Uniform Mark in the range 0-19 and will be recorded as UU (unclassified).

2.7.3 Overall Grade

The uniform marks awarded for each unit will be aggregated and compared to pre-set boundaries. Results for the qualification will be awarded on a scale of A*A* to GG and will be recorded twice on the certificate as such.

Uniform marks correspond to *overall* grades as follows:

	A*A*	AA	BB	CC	DD	EE	FF	GG
UMS (max 300)	270	240	210	180	150	120	90	60

2.8 SPECIAL ARRANGEMENTS

Candidates with special requirements must cover the assessment objectives. There may be more suitable ways of doing this than those used by the Centre with other candidates. Any Centre wishing to start candidates with special requirements on the course who might not be able to meet the requirements of the assessment must consult the Special Requirements Unit before doing so (telephone 01223 552505).

2.9 RESULTS ENQUIRIES AND APPEALS

Under certain circumstances, a Centre may wish to query the grade available to one or more candidates or to submit an appeal against the outcome of such an enquiry. Enquiries about unit results must be made immediately following the series in which the relevant unit was taken.

For procedures relating to enquiries on results and appeals, Centres should consult the Handbook for Centres and the document *Enquiries about Results and Appeals - Information and Guidance for Centres* produced by the Joint Council. Further copies of the most recent edition of this paper can be obtained from OCR.

3 Further Information and Training for Teachers

To support teachers using this specification, OCR will make the following materials and services available:

- a full programme of In-Service Training meetings arranged by its Training and Customer Support Division (telephone 01223 552950);
- a dedicated subject-specific telephone number (01223 553795);
- a website that will include materials to assist with delivery (www.ocr.org.uk);
- teacher support material;
- exemplar candidate work;
- candidate guides;
- specimen assessments;
- past external examinations;
- a report on the examination, compiled by senior examining personnel after each examination session;
- individual feedback to each Centre on the moderation of portfolios;
- a portfolio consultancy service.

A Publications Catalogue may be obtained from OCR's publications department:

- tel. 0870 870 6622
- fax 0870 870 6621
- e-mail: publications@ocr.org.uk

The OCR Information Bureau:

- tel. 01223 553998
- e-mail: helpdesk@ocr.org.uk

The OCR website address is www.ocr.org.uk


The website contains copies of the specification, example assessments, support materials and current information of relevance to Centres.


4 Key Skills Guidance

Key Skills are central to successful employment and underpin future success in learning independently. Whilst they are certificated separately, the *Key Skills Guidance* for this qualification has been designed to support the teaching, learning and assessment of the vocational content, as well as that of the Key Skills. Opportunities for developing the Key Skills of *Communication, Application of Number, Information Technology, Working with Others, Problem Solving* and *Improving Own Learning and Performance* are indicated for each unit.

Key Skills and vocational achievement are interdependent, especially at Level 1. This guidance has been developed to show how vocational and Key Skills achievement can be successfully combined.



The guidance has been split into two sections: *Keys to Attainment* and *Signposts*. The two sections should be used in conjunction with, and are intended to complement, each other.







Keys to Attainment  show where the units contain clear opportunities for generating Key Skills portfolio evidence. A *Key to Attainment* does not negate the need for candidates to develop and practise the key skill during teaching and learning.

Signposts  show where the units contain opportunities for developing the Key Skill, and possibly for generating portfolio evidence if teaching and learning is focused on that aim.

Aspects of Key Skills are distributed throughout the units, usually as *Signposts* but sometimes as *Keys to Attainment*. This may appear repetitive, but occurs because some Key Skills may be achieved in several different ways (multiple *Signposts*), but others are genuinely key to the achievement of the vocational aspect (*Keys to Attainment*). For example, IT1.1 - ‘find, explore and develop information for **two** different purposes’, will appear more than once in any GCSE (Double Award) because the Key Skill needs to be achieved in **two** different contexts. Another example of where a Key Skill may be split between units is C1.1 - ‘take part in a *one-to-one* discussion and a *group* discussion...’, because the **two** discussions can be completely independent of each other.

KEY SKILLS MAPPING

-  the unit contains clear opportunities for generating Key Skills portfolio evidence.
-  the unit contains opportunities for developing the Key Skill, and possibly for generating portfolio evidence if teaching and learning is focused on that aim.
- x** there are no obvious opportunities for the development or assessment of the Key Skill in the unit.

Key Skill (Level 2)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
C2.1a: Contribute to a discussion about a straightforward subject.	1		Put forward specific suggestions on how a tourism destination may be developed in a sustainable manner.
	2		Discussing how marketing is aimed at different groups of people, how marketing is targeted and how promotional materials are used in the leisure and tourism industry, as a group. Also, discussing the different aspects of the marketing mix, perhaps with reference to own experience.
	3		Purposeful interaction (simulated or otherwise) with a customer, dealing with different issues such as a complaint or a person with a particular need. Showing clear contributions and responses, appropriate listening and body language.
C2.1b: Give a short talk about a straightforward subject, using an image.	1		Using an image, identify and discuss the visual/social/economic/environmental impacts of tourism on a chosen destination.
	2		Presenting, to the class or others, information on the effectiveness of particular promotional campaigns or marketing, supported by examples of materials used, SWOT analyses of organisations in the industry, etc.
	3		Explaining services and facilities to customers, relying on supporting images such as maps or diagrams, and adapting to the audience and situation.
C2.2: Read and summarise information from two extended documents about a straightforward subject. One of the documents should include at least one image.	1		Holiday brochures, publicity material for leisure facilities, local amenity guides, local chamber of commerce materials, tourist information publications, textbooks etc. There must be evidence that information from such sources has been summarised in the candidate's work.
	2		Advertising and promotional materials: brochures, posters, reviews etc., textbooks, market research reports, trade magazines, newspaper articles. There must be evidence that information from such sources has been summarised in the candidate's work.
	3		Customer service documents (e.g. customer charters, service guarantees, complaints procedures) from tourist and leisure facilities, text books, etc.
C2.3: Write two different types of documents about straightforward subjects. One piece of writing should be an extended document and include at least one image.	1		Reporting on local leisure facilities, on types of leisure activity and facility, on the structure of the industry etc. Producing leaflets, newspaper articles etc. on local facilities' products and services. Reporting on the variety of tourism destinations in the UK and on employment opportunities within the industry.
	2		Reporting on market research findings and on targeted marketing campaigns, analysing the marketing mix for a particular product of the leisure industry, using images and other graphical techniques. Producing promotional materials: leaflets, brochures, articles etc, again using a combination of text and images.
	3		Reporting on the different needs of different types of customer, with reference to a particular location or facility, using images, a case study showing the benefits of good customer service etc.

Key Skill (Level 2)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence	
		Note: these are illustrative only.	
N2.1: Interpret information from two different sources, including material containing a graph.	1	⊖	Using data in tabular and graph form to develop an understanding of the relative merits of different types of transport in terms of cost convenience and availability
	2	⊖	Interpret data from two different market surveys to evaluate the success of a marketing campaign
	3	✗	
N2.2a: Carry out calculations to do with amounts and sizes.	1	✗	
	2	✗	
	3	✗	
N2.2b: Carry out calculations to do with scales and proportions.	1	✗	
	2	✗	
	3	✗	
N2.2c: Carry out calculations to do with handling statistics.	1	✗	
	2	⊖	Presenting marketing information in statistical form and allowing candidates to support their interpretations of it with their own observational data.
	3	⊖	Keeping customer records to provide an up-to-date picture and helping to forecast, creating predictions for business planning
N2.2d: Carry out calculations to do with using formulae.	1	✗	
	2	✗	
	3	✗	
N2.3: Interpret the results of your calculations and present your findings. You must use at least one graph, one chart and one diagram.	1	✗	
	2	✗	
	3	✗	

Key Skill (Level 2)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
IT 2.1: Search for and select information for two different purposes.	1	⊖	Using the internet, CD ROMS and databases as sources of information about tourist destinations and travel, as well as about local and national leisure facilities. Information from sites such as www.visitbritain.com , www.tourism.wales.gov.uk , www.londontown.com could be used for different pieces of work.
	2	🔑	Accessing marketing and promotional information available on the internet, CD ROMS etc. The challenge is likely to be judging its relevance.
	3	✗	
IT 2.2: Explore and develop information, and derive new information, for two different purposes.	1	✗	
	2	⊖	Developing text and images and importing information e.g. scanned photographs can be brought together in producing reports and promotional materials which present information sensibly and for new and different purposes.
	3	⊖	Creating and/or maintaining customer records, including using them to derive information e.g. on the profile of its members, or on numbers of people using particular facilities. It will be necessary to identify two different purposes.
IT 2.3: Present combined information for two different purposes. Your work must include at least one example of text, one example of images and one example of numbers.	1	⊖	Reporting on travel and tourism or on leisure facilities in a particular area, producing leaflets, posters etc. based on combining information from a range of electronic sources – text, imported images, and using IT to organise and develop work.
	2	⊖	Using text and visual information such as scanned photos, importing images or graphs can be combined in reports e.g. on market research or targeted marketing and/or in the production of promotional materials e.g. for a local attraction.
	3	✗	

Key Skill (Level 2)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
WO2.1: Plan straightforward work with others, identifying objectives and clarifying responsibilities, and confirm working arrangements.	1	X	
	2	⊖	Allocating individual members of a group with responsibility for evaluating a leisure or tourism marketing campaign, doing a SWOT analysis of an organisation in the industry, producing promotional materials etc. could fulfil the requirement for group working in this Key Skill.
	3	⊖	Dealing with customers (simulated or real) including contact with a manager, with whom objectives etc. for providing good customer service might be agreed and confirmed. This would satisfy the one-to-one evidence requirement for this Key Skill.
WO2.2: Work co-operatively with others towards achieving identified objectives, organising tasks to meet your responsibilities.	1	X	
	2	⊖	Allocating different tasks to members of the group e.g. to carry out simple market research, to design a logo etc., which they must then progress themselves to meet the group's objectives, seeking advice as necessary. Could fulfil the requirement for one-to-one working if work in pairs or have contact with a professional in the field e.g. Tourist Information representative, tour operator, tutor etc.
	3	⊖	Working as part of a customer services team – real or simulated –requiring the provision of high quality customer service at an individual level, meeting individual objectives while at the same time working co-operatively and well with other members of the team. This would satisfy the group-working requirement of this Key Skill.
WO2.3: Exchange information on progress and agree ways of improving work with others to help achieve objectives.	1	X	
	2	⊖	Planning the group's work to allow for progress checking, feedback and brainstorming e.g. on ways to find information, or to approve designs etc.
	3	X	

Key Skill (Level 2)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
PS2.1: Identify a problem and come up with two options for solving it.	1	X	
	2	⊖	Developing promotional materials: identifying a focus e.g. promoting a local attraction to younger people, setting objectives e.g. to increase visitor numbers, brainstorming ideas for how to promote the attraction, trying some out on paper and then choosing the best ideas.
	3	⊖	Tackling problems brought by customers, involving clarification of the problem, a reference to the standards expected, at least two suggestions for resolution and agreement as to how best to proceed.
PS2.2: Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed.	1	X	
	2	⊖	Going ahead with the development of chosen promotional materials, supported by planning and organisation and building in opportunities to review work and make any necessary adjustments. Also appropriate use of support e.g. from a tutor, art teacher, the owners of the attraction etc.
	3	⊖	Tackling the problem brought by the customer, by following up the solution agreed with them. Reacting positively to any problems or variations in what was intended e.g. if find they cannot get a refund on the ticket price, consider a free ticket for another day, taking advice as necessary.
PS2.3: Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving.	1	X	
	2	X	
	3	⊖	Checking whether a problem brought by a customer has been resolved by reference to customer services standards, supervisors, the customer etc. Some evaluation of how the problem was solved, either to a manager or in a report would also be expected.

Key Skill (Level 2)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence	
		Note: these are illustrative only.	
LP2.1: Help set short-term targets with an appropriate person and plan how these will be met.	1	X	
	2	⊖	Planning work in such a way as to allow opportunities for target-setting and planning, on a one-to-one basis with the candidate.
	3	X	
LP2.2: Take responsibility for some decisions about your learning, using your plan and support from others to help meet targets. Improve your performance by: <ul style="list-style-type: none"> • Studying a straightforward subject • Learning through a straightforward practical activity. 	1	X	
	2	⊖	If the candidate takes responsibility for successfully executing the plan agreed in LP2.1, and chooses different approaches to finding out what they need to know, including a practical activity such as visiting the local tourist information or testing out their promotional ideas on someone.
	3	X	
LP2.3: Review progress with an appropriate person and provide evidence of your achievements, including how you have used learning from one task to meet the demands of a new task.	1	X	
	2	⊖	Reviewing what has been learned and how they went about it, on a one-to-one basis with the candidate, e.g. in tutorials.
	3	X	

Key Skill (Level 1)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
C1.1: Take part in a one-to-one discussion and a group discussion about <i>different</i> straightforward subjects.	1	x	
	2	⊖	Discussing how marketing is aimed at different groups of people and how promotional materials are used in the leisure & tourism industry. Also, discussing the different aspects of the marketing mix, perhaps with reference to own experience.
	3	🔑	Purposeful interaction (simulated or otherwise) with a customer, dealing with different issues such as a complaint or a person with a particular need. Showing clear contributions and responses, appropriate listening and body language.
C1.2: Read and obtain information from two different types of documents about straightforward subjects, including at least one image.	1	⊖	Holiday brochures, publicity material for leisure facilities, local amenity guides, local chamber of commerce materials, tourist information publications, textbooks etc.
	2	🔑	Advertising and promotional materials: brochures, posters, reviews etc., textbooks, market research reports, trade magazines, newspaper articles.
	3	⊖	Customer service documents (e.g. customer charters, service guarantees, complaints procedures) from tourist and leisure facilities, text books, etc.
C1.3: Write two different types of documents about straightforward subjects. Include at least one image in one of the documents.	1	⊖	Reporting on local leisure facilities, on types of leisure activity and facility, on the structure of the industry etc. Producing leaflets, newspaper articles etc. on local facilities' products and services. Reporting on the variety of tourism destinations in the UK and on employment opportunities within the industry.
	2	⊖	Reporting on market research findings and on targeted marketing campaigns, analysing the marketing mix for a particular product of the leisure industry, using images and other graphical techniques. Producing promotional materials: leaflets, brochures, articles etc., again using a combination of text and images.
	3	⊖	Reporting on the different needs of different types of customer, with reference to a particular location or facility, using images, a case study showing the benefits of good customer service etc.

Key Skill (Level 1)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence	
		Note: these are illustrative only.	
N1.1: Interpret straightforward information from two different sources. At least one source should be a table, chart, diagram <i>or</i> line graph.	1	X	
	2	X	
	3	X	
N1.2a: Carry out straightforward calculations to do with amounts and sizes.	1	X	
	2	X	
	3	X	
N1.2b: Carry out straightforward calculations to do with scales and proportion.	1	X	
	2	X	
	3	X	
N1.2c: Carry out straightforward calculations to do with handling statistics.	1	X	
	2	🔑	Presenting marketing information in statistical form and allowing candidates to support their interpretations of it with their own observational data.
	3	X	
N1.3: Interpret the results of your calculations and present your findings. You must use one chart and one diagram.	1	X	
	2	X	
	3	X	

IT 1.1: Find, explore and develop information for two different purposes.	1	⊖	Using suggested sources on the internet, CD ROMS and databases as sources of information about tourist destinations and travel, as well as about local and national leisure facilities. Information from sites such as www.visitbritain.com , www.tourism.wales.gov.uk , www.londontown.com could be used for different pieces of work.
	2	🔑	Accessing marketing and promotional information from given sources on the internet, CD ROMS etc. The challenge is likely to be judging its relevance.
	3	⊖	Using IT in developing written work, etc.
IT 1.2: Present information for two different purposes. Your work must include at least one example of text, one example of images and one example of numbers.	1	X	
	2	⊖	Developing text and images and importing information e.g. scanned photographs and IT can be used to present information sensibly and to a high standard in reports and promotional materials.
	3	⊖	Creating and/or maintaining customer records, including using them to derive information e.g. on the profile of its members, or on numbers of people using particular facilities. It will be necessary to identify two different purposes.

Key Skill (Level 1)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence	
		Note: these are illustrative only.	
WO1.1: Confirm what needs to be done to achieve given objectives, including your responsibilities and working arrangements.	1	X	
	2	⊖	Identifying with an appropriate person both group and individual responsibilities, as well as planning working arrangements for e.g. evaluating a leisure or tourism marketing campaign, doing a SWOT analysis of an organisation in the industry, producing promotional materials etc. Could fulfil the requirement for group working in this Key Skill.
	3	⊖	Dealing with customers (simulated or real) including contact with a manager, with whom objectives etc. for providing good customer service might be agreed and confirmed. This would satisfy the one-to-one evidence requirement for this Key Skill.
WO1.2: Work with others towards achieving given objectives, carrying out tasks to meet your responsibilities.	1	X	
	2	⊖	Members of the group will have their own responsibilities e.g. to carry out simple market research, to design a logo etc., which they must then carry out, working safely and effectively and seeking advice as necessary. Could fulfil this Key Skill's requirement for one-to-one working if work in pairs or have contact with a professional in the field e.g. Tourist Information representative, tour operator, tutor etc.
	3	⊖	Working as part of a customer services team – real or simulated – requiring the provision of high quality customer service at an individual level, meeting individual objectives while at the same time working effectively and safely with other members of the team. This would satisfy the group-working requirement of this Key Skill.
WO1.3: Identify progress and suggest ways of improving work with others to help achieve given objectives.	1	X	
	2	⊖	If group working is planned in such a way as to allow discussion of progress, identification of good ways of tackling the project, as well as problems and how they were dealt with, with a view to suggesting better ways of working together.
	3	X	

Key Skill (Level 1)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
PS1.1: Confirm your understanding of the given problem with an appropriate person and identify two options for solving it.	1	X	
	2	⊖	Developing promotional materials: identifying the problem with an appropriate person e.g. promoting a local attraction to younger people, how success is measured e.g. in increased visitor numbers, and then considering ideas for how to promote the attraction, trying some out on paper and then choosing the best ideas.
	3	⊖	Tackling problems brought by customers, involving clarification of the problem, some reference to the standards of service expected, consideration of suggestions for resolution and agreement on how best to proceed.
PS1.2: Plan and try out at least one option for solving the problem, using advice and support given by others.	1	X	
	2	⊖	Going ahead with the development of chosen promotional materials, planning and organising work e.g. identifying deadlines and materials needed. Also making appropriate use of support e.g. from a tutor, art teacher, the owners of the attraction etc.
	3	⊖	Tackling the problem brought by the customer, by following up the solution agreed with them, taking advice as necessary.
PS1.3: Check if the problem has been solved by following given methods and describe the results including ways to improve your approach to problem solving.	1	X	
	2	X	
	3	⊖	Checking whether a problem brought by a customer has been resolved by reference to customer services standards, supervisors, the customer etc. Describing the problem and how it was resolved, either to a manager or in a report, making basic suggestions for avoiding such problems again.

Key Skill (Level 1)	Unit	Examples of opportunities for developing the Key Skill or for generating Key Skills portfolio evidence Note: these are illustrative only.	
LP1.1: Confirm understanding of your short-term targets and plan how these will be met, with the person setting them.	1	X	
	2	⊖	If the group's work is planned to allow an appropriate person to set individual targets and also identify: action points e.g. to collect samples of marketing materials, deadlines, arrangements for reviewing progress, and who to ask for help.
	3	X	
LP1.2: Follow your plan, using support given by others to help meet targets. Improve your performance by: <ul style="list-style-type: none"> • Studying a straightforward subject • Learning through a straightforward practical activity. 	1	X	
	2	⊖	If the candidate carries out the tasks planned in LP1.1, and uses different approaches to finding out what they need to know, including a practical activity such as visiting the local tourist information or testing out their promotional ideas on someone. Seeking support where necessary.
	3	X	
LP1.3: Review your progress and achievements in meeting targets, with an appropriate person.	1	X	
	2	⊖	Reviewing what has been learned and how the candidate went about it, on a one-to-one basis, e.g. in tutorials, with encouragement to identify good work and bad, with suggestions for improvements.
	3	X	

5 Specification Units

Units will have some or all of the following sections:

About this unit	This includes a brief description for the candidate of the content, purpose and vocational relevance of the unit. It states whether the unit is assessed externally or through portfolio evidence.
What you need to learn	This specifies the underpinning knowledge, skills and understanding candidates need to apply in order to meet the requirements of the portfolio evidence or external assessment.
Assessment evidence	This specifies the evidence candidates need to produce in order to meet the requirements of each portfolio unit. It is divided into the following parts: <ul style="list-style-type: none">• <i>You need to produce</i> – this banner heading sets the context for providing the evidence, e.g. a report, an investigation, etc;• <i>A typical candidate at grades GG to EE etc. will:</i> – this describes the quality of the work a candidate needs to demonstrate in order to achieve the grades specified.
Guidance for teachers	This provides advice on teaching and assessment strategies. There will be advice on: <ul style="list-style-type: none">• the provision of the vocational context of the unit;• accurate and consistent interpretation of national standards;• the use of appropriate internal assessments, taking into account the full range of grades to be covered. There may also be advice on: <ul style="list-style-type: none">• exploiting local opportunities (e.g. information sources, events, work experience);• resources.
Key Skills guidance	This signposts opportunities for developing and assessing Key Skills within the unit.

6 Unit 1: Investigating Leisure and Tourism

6.1 ABOUT THIS UNIT

This unit will help you understand the important part that leisure and tourism play in today's society.

The leisure and tourism industries in the UK provide a variety of activities for people to enjoy in their leisure time. You will learn that the industries are made up of many different facilities and organisations, from leisure centres and theatres to travel agents and airlines.

You will consider how the leisure and tourism industries are linked and how they work together to offer visitors a good service.

You will use learn about the characteristics of the leisure industry and use this knowledge to investigate the leisure industries in an area. You will gather information on facilities in the area and match them to the key components of the leisure and tourism industries.

You will also learn about the characteristics of the travel and tourism industry. Tourism destinations are places that people choose to visit and where they spend their leisure time. You will study the ways in which the travel and tourism industry provides products and services for people in the United Kingdom who wish to visit these destinations.

You will study a selection of the popular tourism destinations in the United Kingdom including:

- where they are;
- what they offer visitors;
- the main transport routes to them.

The unit provides a basis for the more detailed study of the leisure and tourism industries that you will carry out through other parts of your GCSE (Double Award). It may also contribute to the underpinning knowledge in NVQ *Sport and Recreation* and *Travel Services*.

This unit is assessed solely through an externally set test.

6.2 WHAT YOU NEED TO LEARN

6.2.1 The Leisure Industry

Leisure can be described as the range of activities that individuals undertake in their free time.

Leisure is one of the fastest-growing industries in the UK. People are always looking for new ways to spend their leisure time. You need to know that leisure activities are many and varied and include activities such as:

- reading;
- sport – participating and spectating;
- going to the cinema or a disco;
- going for a walk;
- watching television or listening to the radio;
- eating out;
- playing computer games;
- visiting a tourist attraction.

Since the term *leisure* covers an enormous range of activities and facilities in a wide variety of situations, it is useful to divide the leisure industry into a number of key components that you will need to know about. The key components are:

- sport and physical recreation, e.g. hockey, football and gymnastics;
- arts and entertainment, e.g. theatres, cinemas, night-clubs;
- countryside recreation, e.g. walking, cycling;
- home-based leisure, e.g. watching TV, gardening, DIY, computer games;
- children's play activities, e.g. adventure playgrounds and play schemes;
- visitor attractions, e.g. historic buildings and sites, theme parks and leisure parks;
- catering, e.g. pubs, cafes, restaurants.

In any area there will be a variety of organisations and facilities that fit into each of these components. You will need to consider how leisure provision meets the needs of different people in an area and how this provision has changed in the last twenty years. You will also need to know that in other areas of the UK there will be different types of leisure provision.

You will need to understand that these components are often interrelated. For example, horse riding can be classed as both a sport and a countryside recreation activity.

The leisure industry has grown to meet people's leisure needs and is made up of a wide range of facilities, for example:

- leisure centres and health clubs;
- libraries;
- video-rental shops;
- cinemas and theatres;
- pubs, restaurants and take-away restaurants;
- community centres;
- museums and galleries;
- sports venues;
- theme parks.

You will need to know about these facilities. You will also need to know about facilities that provide for home-based leisure, such as:

- take-away restaurants;
- video-rental shops;
- bookshops;
- libraries;
- shops selling computer games.

You will also need to know that leisure facilities provide a range of products and services. For example, a leisure centre might provide:

- sports activities;
- lessons and classes for different groups of people;
- functions;
- food and drink;
- special rates for members and/or groups;
- purchase and hire of equipment.

You will need to know that the choices that people make about how to enjoy their leisure time may be influenced by many factors, including:

- age group;
- culture;
- special needs;
- type of household, for example families, single people, couples;
- gender;
- social group.

You will also need to know about other factors that affect what people choose to do in their leisure time. These include:

- the availability of local facilities;
- the availability of transport;
- their interests;
- fashion;
- the influence of family and friends;
- how much money they have to spend on leisure.

Few industries can match the leisure industry for the range of employment opportunities it offers. You will need to know about the range of jobs, for example:

- leisure assistants;
- fitness instructors;
- lifeguards;
- ground staff;
- park rangers;
- restaurant managers.

6.2.2 The Travel and Tourism Industry

You will need to know what tourism is. Tourism is a broad area to define but it usually covers temporary travel away from home or work. An essential part of tourism is the traveller's intention to return home afterwards. The purpose of visits include:

- a holiday;
- sightseeing;
- visiting an attraction;
- visiting friends or relatives;
- going to a sports event as a spectator or to participate;
- business.

Since the term *travel and tourism* covers an enormous range of activities in a wide variety of situations, it is useful to divide the industry into key components that you will need to know about. The key components are:

- travel agents;
- tour operators;
- tourist information and guiding services;
- on-line travel services;
- accommodation and catering;
- attractions;
- transportation.

You will need to know about the following different types of holiday:

- package;
- independent;
- domestic;
- in-bound and out-bound;
- holidays involving short haul and long haul flights;
- special interest (e.g. sports, cultural);
- short break.

You will need to know about the following methods of travel used by people to get to their chosen destination and how they travel around the area they are visiting. You will need to understand their relative merits, in terms of cost, convenience and availability:

- air;
- rail;
- sea;
- road (bus, coach, car, taxi).

You will also need to know about the variety of tourism destinations across the United Kingdom which may be popular with both UK and overseas visitors. These can be grouped as:

- coastal areas, such as seaside towns and Heritage Coasts;
- countryside areas, such as National Parks, Areas of Outstanding Natural Beauty, forests, mountain areas, lakes;
- tourist towns and cities;
- sporting venues;
- theme parks;
- places of historic interest.

You will also need to consider the social, economic and environmental impact of tourism on at least **two** of these destinations and how they may be developed in a sustainable manner.

The travel and tourism industry consists of a wide variety of organisations of different sizes and offers many employment opportunities. You will need to know about the range of jobs, for example:

- travel consultant;
- conference organiser;
- coach driver;
- air cabin crew;
- tourist guide;
- resort representative.

6.2.3 Links between Leisure and Tourism

You will need to understand that although the leisure and tourism industries are generally considered separately, there are many links between the two, for example, accommodation and catering, attractions and transportation. Both industries are dependent upon each other for customers, for example:

- a family day out at a visitor attraction is a leisure activity but also involves travel and tourism;
- travelling to an away football match could be considered as both leisure and tourism;
- going on holiday, and many of the activities undertaken while on holiday, could be considered as both leisure and tourism;
- going to the theatre and staying in a hotel overnight is both leisure and tourism.

The local tourist information centre provides details of both leisure and tourism facilities and activities. Transport providers operate services to places of interest for both the leisure market and tourists.

6.3 GUIDANCE FOR TEACHERS

6.3.1 Guidance on Delivery

It is suggested that unit delivery should not be focused on preparing candidates solely for the external assessment. It is important that candidates study all aspects of the leisure and tourism industries so that they can develop a clear appreciation and understanding of what they entail.

There are no place-specific requirements but it is expected that candidates will have a clear idea about provision within their local area as well as the UK as a whole. Clearly, the provision of leisure facilities at the local level will be broadly similar throughout most of the country. The range, type and scale of facilities may vary but all UK locations will have access to some appropriate examples. Candidates will be expected to make reference to actual facilities and locations that they have investigated or studied to illustrate the content specified in the *What You Need to Learn* section of the unit.

A similar approach is needed when studying the travel and tourism aspects. It will be expected that candidates will have investigated a minimum of **two** destinations in some detail as well as having studied the more general aspects specified in the *What You Need to Learn* unit content.

However, it should be remembered that there are clear links between leisure and tourism and there are many instances where a study of a particular location will allow aspects of both industries to be investigated. For example, the study of a local hotel could easily be developed to provide exemplification of the following *What You Need to Learn* topics:

- Health club facility;
- Restaurant/catering facility;
- Range of jobs e.g. restaurant manager, conference organiser, leisure assistant;
- Accommodation services;
- Short break packages;
- Business tourism products & services.

Similarly, the study of a National Park, sports venue or a holiday resort could be developed to provide exemplification of a variety of *What You Need to Learn* topics.

Centres are advised to make maximum use of local opportunities and to collect information from a variety of sources. The stimulus materials used in the external assessment will be obtained from readily available sources and it will be to the candidates' advantage to be familiar with such material.

There are a wide variety of printed materials available about leisure and tourism facilities, products and services. Candidates will be expected to be able to extract and utilise relevant information.

6.3.2 Guidance on Assessment

This unit is externally assessed and the external test has been designed to allow candidates to demonstrate their ability to:

- a show knowledge and understanding of the unit content;
- b apply the knowledge, skills and understanding specified in the unit content;
- c examine vocationally-related issues and problems, analyse relevant information, evaluate evidence, make reasoned judgements and present conclusions.

Each of the above assessment objectives will be weighted, for external assessment purposes, as follows:

50% of the marks on the paper will relate to **a** above;

25% of the marks on the paper will relate to **b** above;

25% of the marks on the paper will relate to **c** above.

The test has been designed to support the underlying principles and structure of the unit. The unit content specified in the *What You Need to Learn* section emphasises that the Leisure and Travel and Tourism industries have certain characteristic features and that there are clear links between the two of them. The test will seek to strike a balance between the two industries and thus **two** questions will have a clear Leisure focus and **two** questions will have a clear Travel and Tourism focus. The links between the two industries will be contained within aspects of particular questions.

Each question will have an appropriate vocational context and will feature at least **one** piece of stimulus material. The stimulus material will be derived from current Leisure and Tourism publications and will be selected on the basis of its ability to illustrate key aspects of the content itemised in the unit's *What You Need to Learn* section. Each question will be sub-divided and will end with an opportunity to write more openly about an identified topic or issue. Such answers will be assessed using level of response criteria and will target **c** above.

A specimen test and mark scheme has been prepared to provide clarification of the above points. These are included after this specification.

The grade threshold for the test will be determined by the Awards Committee using the grade descriptors in Section 2.6.

6.3.3 Resources

This specification is supported by OCR approved Heinemann Texts.

There are many sources of information that provide good general material on the leisure and tourism industries including textbooks with case studies of particular organisations and candidate study packs produced by specific attractions and the like.

Centres should make the most of the opportunities presented by Unit 2: *Marketing in leisure and tourism* and utilise the promotional materials that will be examined to generate marketing assessment evidence. Tourist Information Centres carry an extensive range of suitable materials and individual tourist boards produce a variety of guides and leaflets. Similarly, the local authority will produce a digest of its local facilities and the local library, council office and civic centre will usually hold suitable material.

There is no substitute for a visit to a local leisure or travel and tourism provider and centres are strongly advised to arrange such an opportunity for their candidates. A work placement within a leisure and tourism environment is equally valuable. Both activities will be significant learning opportunities for the candidates and will afford them the opportunity to gather additional information to both support and enrich their studies.

The Internet is a very good way in which to access relevant and reliable material and there are many sites that are worth investigation including:

- tourist boards;
- local authorities;
- visitor attractions;
- professional organisations;
- transport providers;
- tour operators;
- hotel chains;
- leisure centres;
- health clubs;
- theatres;
- sports stadiums.




Centres wishing to access information in a more comprehensive manner would be well advised to examine the services available from:










- The Tourism Society (tel. 020 7488 2789) 1-2 Queen Victoria Terrace, Sovereign Court, London E1W 3HA, www.toursoc.org.uk;
- Springboard UK (tel. 020 7497 8654) 3 Denmark Street, London WC2H 8LP, www.springboard.org.uk;
- Sport England (tel. 020 7273 1500) 16 Upper Woburn Place, London, WC1H 0QP, www.sportengland.org;
- The Sports Council for Wales (tel. 029 2030 0500) Sophia Gardens, Cardiff, CF11 9SW, www.sports-council-wales.co.uk;
- The Sports Council for Northern Ireland (tel. 028 9038 1222) House of Sport, Upper Malone Road, Belfast, BT9 5LA, www.sportsni.org;
- Department for Culture, Media and Sport, www.culture.gov.uk;
- National Statistics, www.statistics.gov.uk;
- Institute of Leisure and Amenity Management, www.ilam.co.uk;
- Institute of Sport and Recreation Management, www.isrm.co.uk.

The Learning and Skills Development Agency is a strategic national resource for the development of policy and practice in education and training. The agency was previously known as the Further Education Development Agency (FEDA). Their website www.lsd.gov.uk provides valuable resources for all GCSEs in vocational subjects.

6.3.4 Key Skills Mapping

Details on delivery are given in Section 4.

-  this unit contains clear opportunities for generating Key Skills portfolio evidence.
-  this unit contains opportunities for developing the Key Skill, and possibly for generating portfolio evidence if teaching and learning is focused on that aim.
-  there are no obvious opportunities for the development or assessment of the Key Skill in this unit.

Criterion	C	N	IT	WO	PS	LP
1.1	x	x		x	x	x
1.2		x	x			
1.3		x				
2.1				x	x	x
2.2		x	x			
2.3		x				

7 Unit 2: Marketing in Leisure and Tourism

7.1 ABOUT THIS UNIT

Marketing is an important aspect of today's leisure and tourism industries. Whatever the type of leisure or tourism organisation and its reasons for providing products and services, the basic principle underpinning marketing is the same: getting the right product to the right people in the right place at the right price using the right promotion. As the leisure and tourism industries are highly competitive and customers are becoming more demanding, any organisation that does not use marketing effectively will not succeed.

This unit introduces you to the **four** key marketing tools that organisations use:

- target marketing;
- market research;
- the marketing mix;
- SWOT analysis.

You will investigate the marketing activities of leisure and tourism organisations. You will also investigate in detail the marketing activities of **one** organisation and produce an item of promotional material for it.

The unit builds on the introductory work you completed in Unit 1: *Investigating leisure and tourism* and links well with Unit 3: *Customer service in leisure and tourism*. It may also contribute to the underpinning knowledge in NVQs in *Travel Services, Sport and Recreation* and *Marketing*.

*You should be **selective** and include in your portfolio work from this unit that **meets the evidence requirements**.*

This unit is assessed solely through portfolio assessment.

7.2 WHAT YOU NEED TO LEARN

7.2.1 What is Marketing?

Whatever the type of leisure or tourism organisation and its reasons for providing products and services, the basic principle underpinning marketing is the same: getting the right product to the right people in the right place at the right price using the right promotion.

7.2.2 Target Marketing

It is important for organisations to recognise that different groups of customers, known as *market segments*, have different needs. Target marketing is a tool that helps an organisation ensure that it is offering the right goods and services to the different groups.

You will need to understand that markets can be segmented in a number of ways, including by:

- age;
- gender;
- social group;
- lifestyle;
- ethnicity.

7.2.3 Market Research

Market research is a tool that helps organisations to find out their customers' needs. Market research methods include:

- postal surveys;
- telephone questionnaires;
- personal surveys;
- observation;
- internet.

You will need to know how different leisure and tourism organisations carry out market research.

7.2.4 The Marketing Mix

The term *marketing mix* is used to describe the key elements that an organisation offers in order to meet its customers' needs. It is one of the most important concepts in leisure and tourism marketing.

The marketing mix is often referred to as the '4Ps'. These are:

- product (what goods and services an organisation offers);
- price (how much the goods and services cost);
- place (where the goods and services are offered);
- promotion (how organisations get people to buy their goods and services).

You will need to understand the importance of each of these and how they work together to meet an organisation's objectives.

Product

This is the term used to describe the product or service that an organisation provides to its customers. It includes:

- the product or service features;
- the brand name;
- the after-sales service;
- product life cycle.

Price

This is the term used to describe what a customer pays for a product or service, including:

- the actual selling price;
- any credit terms;
- profitability.

Place

This is the term that describes how the product or service reaches the customer, including:

- the types of outlet or facility used;
- the location of outlets or facilities;
- identification of distribution channels.

Promotion

This is the term used to describe all the methods an organisation uses to tell customers about, and persuade them to buy, its products and services.

You will need to know about the different promotional techniques that leisure and tourism organisations use, including:

- advertising;
- direct marketing;
- public relations;
- personal selling;
- displays;
- sponsorship;
- demonstrations;
- sales promotions.

You will need to understand how leisure and tourism organisations use these techniques to promote their facilities, products and services. You will also need to understand that the type of technique which is most appropriate will depend on the type of organisation, the nature of the product or service being promoted and the type of customer being targeted. For example, a community sports centre would find it more appropriate to advertise in the local paper than on television.

Promotional materials include:

- advertisements;
- brochures and leaflets;
- merchandising materials;
- videos;
- press releases;
- internet sites.

You will need to understand that the effectiveness of these materials depends on many factors, including the way they are designed, the words and images they contain and how they are made available to customers.

You will learn that leisure and tourism organisations place their own particular emphasis on different components of the marketing mix.

7.2.5 SWOT Analysis

You will need to know how a SWOT analysis is carried out and used by organisations to help them find out how they are performing. A SWOT analysis involves looking at:

- strengths;
- weaknesses;
- opportunities;
- threats.

Strengths and weaknesses are seen as internal factors that the organisation can control. Opportunities and threats are outside the control of the organisation.

7.2.6 Promotional Campaigns

Leisure and tourism organisations need to plan their promotional efforts carefully in order to achieve maximum effect and to make the best use of their resources. They need to consider:

- what a promotional campaign is trying to achieve (its objectives);
- who the target market is;
- what promotional technique(s) to use;
- what promotional materials to use;
- how to monitor and evaluate the success of the campaign.

7.3 ASSESSMENT EVIDENCE FOR UNIT 2: MARKETING IN LEISURE AND TOURISM

<p>You need to produce an investigation into the marketing activities of one organisation from the leisure and tourism industry, including:</p> <ul style="list-style-type: none"> a a description of the products and/or services with pricing structures that the organisation offers [6 marks]; b a description of how the products and services are made available [7 marks]; c a description of the market research activities carried out by the organisation [7 marks]; d a comparison of the organisation's promotional campaign with the campaign of one other leisure and tourism organisation [8 marks]; e a SWOT analysis for the chosen organisation [9 marks]. <p>You also need to produce:</p> <ul style="list-style-type: none"> f an item of promotional material related to the chosen organisation's product or service and aimed at a particular target market [13 marks]. 					
<p>A typical candidate at grades GG, FF, EE will:</p>		<p>A typical candidate at grades DD, CC, BB will:</p>		<p>A typical candidate at grades BB, AA, A*A* will:</p>	
<p>a1 Identify the products and/or services with pricing structures for the chosen organisation. 0 1 2</p>	<p>a2 Provide a detailed description of the products and/or services and pricing structures for the chosen organisation. 3 4</p>	<p>a3 Analyse the products and/or services provided by the organisation in relation to the pricing structures. 5 6</p>			<p>6</p>
<p>b1 Identify at a basic level how the products and/or services are made available. 0 1 2</p>	<p>b2 Describe fully how the organisation makes its products and/or services available. 3 4 5</p>	<p>b3 In addition to a full description, recommend one alternative approach which the organisation could make to improve availability of its products/services. 6 7</p>			<p>7</p>
<p>c1 Identify at a basic level the market research activities undertaken by the organisation to meet the needs of different customers. 0 1 2 3</p>	<p>c2 Provide a detailed description of the market research activities undertaken by the organisation to identify market segments. 4 5</p>	<p>c3 Evaluate the market research activities undertaken by the organisation in terms of cost effectiveness. 6 7</p>			<p>7</p>

d1 Comment briefly on the promotional materials/marketing mix of both organisations. 0 1 2 3 4	d2 Suggest other relevant promotional techniques and materials both organisations could use to promote themselves and their products/services. 5 6	d3 Compare the promotional techniques and materials used by one organisation with those used by the other leisure and tourism organisation. 7 8	8
e1 Produce a basic SWOT analysis for the chosen organisation. 0 1 2 3 4	e2 Produce a detailed SWOT analysis for the chosen organisation. 5 6 7	e3 Analyse the SWOT technique for the chosen organisation identifying areas the organisation needs to consider for future development. 8 9	9
f1 Produce a piece of promotional material that includes the basic information for an identified target audience. 0 1 2 3 4 5 6 7	f2 Produce an item of promotional material that shows imagination and is appropriate for a stated target audience. 8 9 10	f3 Demonstrate ability to plan and produce their promotional materials, stating aims, objectives, target audience and evaluate the finished product. 11 12 13	13
Total			50

Note: Although you will be given an interim mark out of 50 by your teacher, this might be adjusted by OCR to make sure that your mark is in line with national standards.

7.4 GUIDANCE FOR TEACHERS

7.4.1 Guidance on Delivery

This unit introduces candidates to the importance of marketing in the leisure and tourism industries. They will study the need for market research in order to make the appropriate decisions within the marketing mix in relation to leisure and tourism. They will need to understand target markets and the relevance of SWOT analyses to marketing decisions made by leisure and tourism organisations. It is important to stress that every organisation has its own approach to marketing its goods and services and that there is no *right answer* when it comes to deciding on the components of the marketing mix.

Candidates also need to be aware of the social, cultural and political environment when considering the marketing mix of organisations to see how they meet the needs of the locality. Promotional materials also need to be prepared which do not offend any specific target market.

Candidates will need to understand the basic theory of marketing and how it relates to leisure and tourism before they can undertake practical work on promotion with the wide use of materials such as brochures, leaflets, posters, videos and advertisements to illustrate points (see *Resources*).

The selection of the chosen organisation to be studied should be considered carefully to ensure that candidates are able to obtain the relevant information to respond to the criteria of the unit. The organisation could be:

- from leisure and recreation;
- from travel and tourism.

7.4.2 Guidance on Assessment

The form of assessment will be in **two** parts:

- the investigation into the marketing activities of **one** leisure and tourism organisation;
- the production of promotional material which could be used by the chosen organisation.

The findings can be presented in a number of ways, such as a report, a presentation or a display. However, whichever method is chosen, internal assessment must be able to be moderated externally; supporting evidence will be needed for the presentation or display formats such as video, photographs, witness/assessor statements, along with materials used by the candidate for the presentation or display.

The description of the products and services will depend on their complexity, but candidates should demonstrate an understanding of the differences between *products* and *services*. If details of pricing of these products and services, such as concessions or senior citizen rates, are included, it is not necessary for candidates to give details of how the original prices were agreed.

For *place*, candidates should include such information as the chain of distribution and the outlets used to get the products or services to the customer, with higher level candidates analysing the organisation's approach and considering alternative methods their chosen organisation may use to distribute their products and/or services.

Candidates will need to understand target markets and how organisations may offer a range of products and services to a range of different customers when describing *research methods*. For example, a travel agency may offer customers a wide range of destinations, travel options, accommodation choices and prices, so it would be difficult for candidates to make a general comment about the target markets involved. However, they could use examples of specific products offered by a travel agency and identify the target markets these are aimed at. Likewise a leisure centre may offer a wide range of activities to suit varied target markets and market research would need to be undertaken to identify the relevant target market.

It is important for candidates to be encouraged to investigate an organisation that uses a range of *promotional techniques, materials* and *research methods*, but not all those listed in the *What You Need to Learn* section need to be undertaken by the chosen organisation. If a visit or guest speaker has been arranged to provide candidates with information, this input should be structured to cover the topics listed without giving candidates all the information they need, so that they are encouraged to ask questions and undertake research of their own.

The description of promotional materials should preferably include what the organisation used under each of the bullet points listed in the *What You Need to Learn* section. Descriptions of a leaflet, for example, might refer to an appendix containing a copy of the leaflet, or include an annotated copy of the leaflet identifying the main points included, such as location, event, prices etc. A poster, for example, might be described in terms of its use of colour, images of relaxation and bold, clear lettering, in addition to the facts displayed.

Candidates must relate the promotional material to their chosen organisation and candidates' own promotional material should be original, rather than presenting material that is already available or simply copying existing material. However, using the chosen organisation as a guide the candidate could create a context (e.g. name of firm, precise product/device, marketing segment etc.) in which to base their promotional material. It may be worth spending some time considering opportunities within the chosen organisation for new promotional materials, such as the launch of a new product or service, the targeting of a new market segment, the relaunch of an existing product or a special event. Suggestions made by a teacher or representative of the organisation will not affect the candidate assessment because it is the material itself that is assessed. The material produced should be authentic to the candidate and unique and should be assessed in terms of its relevance to the intended target market, the quality of its presentation in terms of the use of colour, graphics and so on, and the imagination/originality of the design.

Each portfolio should be marked by the teacher according to the criteria in the *Assessment Evidence Grid* in Section 7.3 (exemplification for which is given later in this section). Photocopiable masters will be supplied and will be sent to Centres at the start of the course.

Each row in the grid comprises a strand showing the development of a given criterion, each row corresponding to a point (a, b, c etc.) in the banner.

Please note that the second column describes the work of a typical candidate working at grades DD, CC and *the lower half of grade BB* whilst the third column describes the work of a typical candidate working at *the upper half of grade BB*, grades AA and A*A*.

The maximum mark for each criteria strand is shown in the right hand column.

Teachers use their professional judgement and circle the mark that *best fits* the work of the candidate and also records it in the column headed *Mark*.

Centres should use the full range of marks available to them; Centres must award *full* marks in any band for work which fully meets the criteria. This is work which is ‘the best one could expect from candidates working at GCSE (Double Award) level’.

Only one mark per strand/row will be entered. The final mark for the candidate is out of a total of 50 and is found by totalling the marks for each strand.

Example: For a candidate’s work that comfortably satisfies criterion **f2** and may be perceived as equivalent to the work of a grade CC candidate, a mark of **9** should be awarded on the scale for this strand of 0-13.

A typical candidate at grades GG, FF, EE will:	A typical candidate at grades DD, CC, BB will:	A typical candidate at grades BB, AA, A*A* will:	Mark	Max
f1 Produce a piece of promotional material that includes the basic information for an identified target audience. 0 1 2 3 4 5 6 7	f2 Produce an item of promotional material that shows imagination and is appropriate for a stated target audience. 8 9 10	f3 Demonstrate ability to plan and produce their promotional materials, stating aims, objectives, target audience and evaluate the finished product. 11 12 13	9	13

The further guidance below clarifies the criteria in the *Assessment Evidence Grid* and will help you to determine the appropriate mark to be awarded for each strand. The marks should then be added to give a total mark out of 50. Section 2.7.1 explains how this mark will be converted to unit grades.

Criterion	Exemplification
a1	Candidates must give a basic identification of the products/services of their chosen organisation which may be in a very simple format.
a2	Candidates need to give more detail about the products and services of the organisation, which may include more complex products, such as guided tours or coaching.
a3	Candidates must analyse the products and/or services of the organisation and relate this to the pricing structure used, including a list of prices with details of discounts, special offers etc.
b1	A simple statement as to how products and/or services given in a1 are made available to the customers of the organisation is required by candidates to meet this criteria.
b2	Candidates will need to give a full description of how their chosen organisation make their products/services available to the customers with specific reference to place in the Marketing Mix.
b3	To achieve the higher marks candidates will need to recommend one viable alternative strategy for their chosen organisation in order that their products/services may be more available to customers.
c1	Candidates should describe the market research activities undertaken by their chosen organisation to meet the needs of different customers. This should cover a minimum of three of the bullet points in the <i>What You Need to Learn</i> section showing understanding of target markets and how organisations may offer a range of products to a range of different customers. This could specify a single product offered by a travel agency and identify the target market this was aimed at (e.g. families, senior citizens, specialist activity market).
c2	The description of market research activities undertaken by the organisation will need to contain more detail covering a wider range of products/services and identifying the target markets for these.
c3	Candidates will need to evaluate the market research activities undertaken by the organisation and be able relate these activities to their cost effectiveness in terms of improving/developing products and services.
d1-3	It should be noted that for all of d a second Leisure and Tourism organisation needs to be investigated to allow comparison. When selecting the second organisation careful consideration is needed to allow an appropriate and relevant contrast.
d1	A brief comment on a minimum of four types of promotional materials or techniques should be given by candidates, from the list of examples given in the <i>What You Need to Learn</i> section, and these should be clearly associated with each organisation. Examples may be presented by the candidates but additional comments should be made as to their effectiveness.

Criterion	Exemplification
d2	Following a study of promotional materials used by the organisations, candidates should recommend other relevant promotional techniques and materials each organisation could use in order to further promote the organisations and their products/services. All the promotional techniques and materials examples given in the <i>What You Need to Learn</i> section should be provided by the candidate and there should be some evidence of individual research undertaken by the candidate.
d3	To achieve the higher marks candidates will need to be able to compare the promotional materials identified in d2 with those used by the other Leisure and Tourism organisation. For example, if the candidate's chosen organisation is a leisure centre, then they could compare its promotional techniques with those of another health club or leisure centre in the area.
e1	Candidates need to produce a SWOT analysis for their chosen organisation. Candidates should give a minimum of one example of <i>Strength</i> , <i>Weakness</i> , <i>Opportunity</i> and <i>Threat</i> for that organisation at the lower mark range. They should bear in mind that strengths and weaknesses refer to the <i>internal</i> operation of the organisation, such as range of facilities offered or lack of these; opportunities and threats are <i>external</i> factors, such as closure or opening of a new leisure facility in the area.
e2	A detailed SWOT analysis is required for the chosen organisation to meet this criteria and more than one feature identified for each SWOT box would lead to higher marks being awarded.
e3	For this criteria candidates need to analyse the SWOT technique for their chosen organisation, and should be able to identify the areas the organisation needs to consider for future development using appropriate technical marketing terms.
f1	Candidates should produce a piece of original promotional material, which should be related to their chosen organisation used in the earlier study. This piece of promotional material should clearly identify the target audience and include the basic information necessary (e.g. name of organisation, address, contact telephone number of the appropriate event).
f2	Having stated a target audience, candidates should produce an item of promotional material which is appropriate for that target audience, contain all the relevant information presenting this accurately, using imagination in terms of display or format.
f3	Candidates need to present supporting evidence of planning and work towards the final item of promotional material, stating the aims and objectives of the project, the target audience and a detailed evaluation of their final product in terms of appeal to the target audience, impact, use of colour and graphics.

The following table indicates which criteria in the *Assessment Evidence Grid* meet which assessment objectives:

Criterion	AO1	AO2	AO3
a1	✓	✓	x
a2	x	x	✓
a3	x	x	✓
b1	✓	✓	x
b2	x	✓	✓
b3	x	x	✓
c1	x	✓	x
c2	x	x	✓
c3	x	x	✓
d1	x	✓	✓
d2	x	x	✓
d3	x	x	✓
e1	✓	✓	x
e2	x	x	✓
e3	x	x	✓
f1	✓	✓	x
f2	x	x	✓
f3	x	x	✓

7.4.3 Resources

This specification is supported by OCR approved Heinemann Texts.

Candidates should be encouraged to collect examples of leisure and tourism promotional materials such as those readily available in leisure centres, libraries, sports centres, tourist information centres etc., perhaps working in small groups to collect information so that no provider is put to any inconvenience. These resources could then be shared amongst others in the groups. It would also be advisable for teachers to collect examples of brochures, leaflets, newspaper travel articles or sections, in order to broaden candidate's awareness of marketing techniques used. Visits to some of the major annual leisure and tourism industry events, (such as Leisure Industry Week, World Travel Market, regional Travel and Holiday Shows), can enable teachers to obtain a wide range of up-to-date promotional materials at low cost. Case studies from textbooks (whether aimed at the leisure and tourism or business candidate) and organisations are useful when it comes to investigating promotional campaigns.

The Learning and Skills Development Agency is a strategic national resource for the development of policy and practice in education and training. The agency was previously known as the Further Education Development Agency (FEDA). Their website www.lsda.org.uk provides valuable resources for all GCSEs in vocational subjects.

In addition to the resources for Unit 1, teachers may also wish to approach some of the following organisations to identify possible people prepared to speak to candidates about the marketing policies of their organisations:




- Leisure centre manager to explain marketing strategies;
- Marketing manager of a local attraction or facility (e.g. hotel, museum);
- Tourist Information Officer or representative from the Regional Tourist Board.









































There are examples of suitable case studies in leisure and tourism textbooks which can be used to develop marketing awareness and strategies used by organisations.

Teachers may also wish to access the following websites for additional support materials: Travel Education project@ Learners Pack@Resource materials (1998) at <http://www.travelchannel.co.uk>; www.visitbritain.com (the BTA website), www.altontowers.com, or www.cadburyworld.co.uk.

7.4.4 Key Skills Mapping

Details on delivery are given in Section 4.

-  this unit contains clear opportunities for generating Key Skills portfolio evidence.
-  this unit contains opportunities for developing the Key Skill, and possibly for generating portfolio evidence if teaching and learning is focused on that aim.
-  there are no obvious opportunities for the development or assessment of the Key Skill in this unit.

Criterion	C	N	IT	WO	PS	LP
1.1						
1.2 (a) (b) (c)		  				
1.3						
2.1						
2.2 (a) (b) (c) (d)		   				
2.3						

8 Unit 3: Customer Service in Leisure and Tourism

8.1 ABOUT THIS UNIT

Leisure and tourism organisations depend on customers to buy and use their goods and services. Without customers, these organisations cannot succeed. Giving excellent customer service plays an important part in helping organisations keep their customers and attract new ones.

In this unit you will find out why customer service is so important in leisure and tourism. You will learn about:

- the different needs of customers and how they are met;
- communicating with customers;
- the importance of personal presentation when dealing with customers;
- why it is important to keep customer records.

You will also practise the skills and techniques needed for giving customer service. You will consider the benefits to organisations, their staff and customers of providing excellent customer service.

This unit builds on the introductory work you completed in Unit 1: *Investigating leisure and tourism* and links well with Unit 2: *Marketing in leisure and tourism*. The unit also links with industry training programmes such as *Welcome Host*. It may contribute to the underpinning knowledge in NVQs in *Travel Services*, *Sport and Recreation* and *Customer Service*.

*You should be **selective** and include in your portfolio work from this unit that **meets the evidence requirements**.*

This unit is assessed solely through portfolio assessment.

8.2 WHAT YOU NEED TO LEARN

8.2.1 What is Customer Service?

All leisure and tourism facilities need to make sure their customers are happy with the service they receive because customers are the most important part of any successful organisation. Customer service includes all contact with the customer, either face-to-face, e.g. when selling the organisation's products or services, or indirect contact, e.g. when dealing with letters of complaint. The nature of the provision of customer service will vary between the various components of the leisure and tourism industry.

Good customer service means putting the needs of the customer first. In organisations that stress good customer service, this should be a main aim of all staff. Good customer service requires you, as a member of staff, to put yourself in the position of your customers. You should be aware of how you would like to be treated if you were a customer and deal with your customers accordingly.

You should understand that leisure and tourism organisations recognise the importance of good customer service to the successful selling of their products. Many organisations aim to exceed customer expectations in order to ensure that customers enjoy themselves, leave having enjoyed themselves and return in the future.

Many leisure and tourism organisations ensure that all staff are provided with training in customer service. Customer service training programmes and NVQs are used by many leisure and tourism organisations.

You will need to understand that there are many different situations in which customer service is provided, for example:

- providing information;
- giving advice;
- receiving and passing on messages;
- keeping records;
- providing assistance;
- dealing with problems;
- dealing with dissatisfied customers;
- offering extra services.

8.2.2 Different Types of Customer

Leisure and tourism facilities are used by a wide variety of people, including those with specific needs such as disabled visitors and people with young children. All require a high level of customer service.

To provide excellent customer service, you will need to identify and meet the differing needs of a wide variety of customers, including:

- individuals;
- groups;
- people of different ages;
- people from different cultures;
- non-English speakers;
- people with specific needs, e.g. sight and hearing impaired people, those requiring wheelchair access, those requiring facilities for young children;
- business men and women.

8.2.3 External and Internal Customers

You will need to understand that customer service includes providing service to both external customers and internal customers.

External customers are an organisation's consumers or visitors. They often pay for products or services and expect to be treated well.

You will need to understand that external customers are the most important part of a leisure and tourism business – without customers, there would be no business! They must be given the highest standards of service so that they come back again and tell their friends about the good time they had.

You will need to understand that *internal* customers are the people you work with, for example other employees of your organisation working in another department. It might seem strange at first to think of your colleagues as customers, but you have the same responsibility to each other as you do to your external customers.

8.2.4 Benefits of Customer Service

You will need to understand that excellent customer service brings a number of benefits for leisure and tourism organisations, such as:

- increased sales;
- satisfied customers;
- more customers through repeat business and recommendations;
- a better public image;
- an edge over the competition.

It is also very important that all members of staff give a high level of service to each other. Benefits to the staff and the organisation include:

- a more pleasant place to work;
- a happier and more efficient workforce;
- improved job satisfaction;
- improved chances of promotion within the organisation.

8.2.5 Communicating with Customers

Most people working in leisure and tourism will, at some time, have contact with customers. This may be face to face, over the telephone or in writing. All customers will expect to receive a very high standard of communication.

When communicating with customers you will need to use appropriate:

- language;
- pitch and tone of voice;
- pauses and silences;
- body language.

You will also need to be able to:

- work accurately;
- listen and respond to customers;
- ask appropriate questions (using open and closed questions).

8.2.6 Personal Presentation

First impressions count in any business, particularly in leisure and tourism, where dealing with people is such an important part of the work. You will need to understand that the way you and your organisation presents itself to customers has a direct influence on their enjoyment, your job satisfaction and the future success of the organisation that employs you. In particular, you will need to understand the importance of:

- dress;
- personal hygiene;
- personality;
- attitude;
- behaviour.

Depending on whether you deal with customers face to face, over the telephone or in writing, some or all of these points may be important.

8.2.7 Handling Complaints

You will need to understand that it is important to listen to customers and to keep calm. You will need to know when to refer a customer to a more senior member of staff if you are not able to deal with an enquiry.

Most of the time, dealing with customers is a rewarding and interesting experience. However, from time to time, you may have to deal with customer complaints. These could be in writing, over the telephone or face-to-face. It is important that you know how to deal with these situations and when and whom to ask for help. When dealing with complaints you should always:

- listen carefully to the customer;
- apologise in general terms for any inconvenience caused;
- let the customer know that the matter will be fully investigated and, if possible, put right;
- try to see the problem from the customer's point of view;
- keep calm and not argue with the customer;
- find a solution to the problem;
- agree the solution with the customer;
- make sure that what you promised to do gets done.

8.2.8 Keeping Customer Records

Many leisure and tourism businesses keep records of their customers. Creating and using up-to-date customer records gives an organisation a clear picture of its business and helps it to plan for the future. For example, a health club might have records of its members' names, addresses, telephone numbers, personal fitness plans and medical details.

Accurate records are an essential part of good customer service. You will need to know how to:

- create customer records;
- find and change existing records;
- show accuracy and confidentiality when working with customers' records.

8.3 ASSESSMENT EVIDENCE FOR UNIT 3: CUSTOMER SERVICE IN LEISURE AND TOURISM

You need to produce a review of the customer service provided by **one** selected leisure and tourism organisation which includes:

- a** an explanation of customer service activities [7 marks];
 - b** how organisations meet the needs of different types of customers, both internal and external [9 marks];
 - c** benefits to the organisation of effective customer service [9 marks];
 - d** identifying records maintained by the organisation to support customer service activities [8 marks].
- You also need to provide a record of:
- e** your involvement in a variety of customer service situations, including personal presentation and communication skills [9 marks];
 - f** handling a customer complaint [8 marks].

A typical candidate at grades GG, FF, EE will:	A typical candidate at grades DD, CC, BB will:	A typical candidate at grades BB, AA, A*A* will:	Mark	Max
a1 Describe at a basic level what is meant by customer service. 0 1 2 3	a2 Explain why customer service is important to their chosen organisation with examples. 4 5	a3 Produce a thorough and knowledgeable analysis of customer service in their chosen organisation. 6 7		7
b1 Describe at a basic level how the organisation meets the needs of a variety of customers and deals with complaints. 0 1 2 3 4	b2 Describe with examples how the organisation meets the needs of its internal and external customers and explain the complaints procedure. 5 6	b3 Evaluate the way the organisation meets the needs of all its customers and analyse its complaint procedures. 7 8 9		9
c1 Describe at a basic level the benefits of effective customer service to the organisation. 0 1 2 3 4	c2 Explain fully the benefits of effective customer service procedures to the organisation. 5 6 7	c3 Recommend improvements in customer service procedures to increase the benefits to the organisation. 8 9		9

d1 Describe two examples of customer service records used by their chosen organisation. 0 1 2 3	d2 Explain with examples how customer service records are used to develop customer service in the organisation. 4 5 6	d3 Suggest alternative ways the organisation could use its existing records to improve customer service provision in the organisation. 7 8	8
e1 Communicate clearly with a variety of customers, listening carefully and responding appropriately. 0 1 2 3 4 5	e2 Deal confidently with a variety of customers, demonstrating good presentation and communication skills. 6 7	e3 Communicate successfully and confidently with customers, listening carefully and providing a full and effective response. 8 9	9
f1 Describe simply how they have handled a customer complaint. 0 1 2 3	f2 Effectively handle a customer complaint, following the procedures of the organisation. 4 5 6	f3 Evaluate their own performance in the customer service situations undertaken, including the handling of complaints made by customers. 7 8	8
Total			50

Note: Although you will be given an interim mark out of 50 by your teacher, this might be adjusted by OCR to make sure that your mark is in line with national standards.

8.4 GUIDANCE FOR TEACHERS

8.4.1 Guidance on Delivery

This unit will develop candidates' awareness and understanding of the importance of excellent customer service in the leisure and tourism industries. The word *excellent* is used to reflect the views of industry managers, who regularly state that customer service must be better than *good* and should exceed, not just meet, customer expectations. This should be reinforced with candidates throughout the delivery of the unit, along with the importance of personal presentation when dealing with customers.

The communication skills of candidates will also need to be developed in order for them to demonstrate ability to deal with a variety of customers and handle customer complaints. They will also need to appreciate the benefit of effective customer records in order to develop the customer service in an organisation.

The performance of customer service roles must be undertaken within a leisure and tourism organisation (and not any other business such as retail). If real leisure and tourism situations are not accessible to candidates, then role plays and simulations may be used but the scenarios for these must be within a leisure and tourism context.

8.4.2 Guidance on Assessment

The first part of the portfolio assessment should be undertaken after at least **one** visit to a leisure and tourism organisation or after input from a guest speaker. Some candidates may be able to complete this part of the portfolio assessment after a period of work experience or part-time employment (within the leisure and tourism industry), but they will need guidance about the type of information they need to collect whilst working in that organisation.

Ideally candidates should be given the opportunity of completing the second part of the portfolio assessment for this unit in a real work situation, preferably on work experience or while working part time in a leisure or tourism organisation. If this is not possible, then the work may be undertaken through simulations and role play, but this should be made as realistic as possible. Centres should try and make use of available opportunities to develop candidates' ability to undertake real customer service situations. It may be of some value for the Centre to consider these opportunities when they occur naturally within the academic year, rather than hoping to find sufficient situations when the unit is being studied.

However the real or simulated customer service activities are undertaken, it is most important that they are suitably evidenced for the moderation process. This could be by way of assessor observations (which must be individual to each candidate in order to give sufficient detail on communication and presentation skills), witness testimonies from supervisors, facility managers or other staff, video or photographic evidence to support any assessor decisions. Standardisation should ensure that each candidate has been assessed fairly and appropriately, so that one assessor's view of performance is not considered to be more lenient than a colleague's.

Candidates need to be able to identify what factors constitute customer service in an organisation as identified in the *What You Need to Learn* section before they can apply this to their chosen organisation. Customer service includes any contact with the customer, whether face-to-face, on the telephone or through correspondence. Candidates can respond to this in very general terms or relate it to any organisation they have visited, but the description should include different types of customer service activities.

Each portfolio should be marked by the teacher according to the criteria in the *Assessment Evidence Grid* in Section 8.3 (exemplification for which is given later in this section). Photocopiable masters will be supplied and will be sent to Centres at the start of the course.

Each row in the grid comprises a strand showing the development of a given criterion, each row corresponding to a point (a, b, c etc.) in the banner.

Please note that the second column describes the work of a typical candidate working at grades DD, CC and *the lower half of grade BB* whilst the third column describes the work of a typical candidate working at *the upper half of grade BB*, grades AA and A*A*.

The maximum mark for each criteria strand is shown in the right hand column.

Teachers use their professional judgement and circle the mark that *best fits* the work of the candidate and also records it in the column headed *Mark*.

Centres should use the full range of marks available to them; Centres must award *full* marks in any band for work which fully meets the criteria. This is work which is 'the best one could expect from candidates working at GCSE (Double Award) level'.

Only one mark per strand/row will be entered. The final mark for the candidate is out of a total of 50 and is found by totalling the marks for each strand.

Example: For a candidate's work that comfortably satisfies criterion **c2** and may be perceived as equivalent to the work of a grade CC candidate, a mark of **6** should be awarded on the scale for this strand of 0-9.

A typical candidate at grades GG, FF, EE will:	A typical candidate at grades DD, CC, BB will:	A typical candidate at grades BB, AA, A*A* will:	Mark	Max
c1 Describe at a basic level the benefits of effective customer service to the organisation. <p style="text-align: right;">0 1 2 3 4</p>	c2 Explain fully the benefits of effective customer service procedures to the organisation. <p style="text-align: right;">5 6</p>	c3 Recommend improvements in customer service procedures to increase the benefits to the organisation. <p style="text-align: right;">7 8 9</p>	6	9

The further guidance below clarifies the criteria in the *Assessment Evidence Grid* and will help you to determine the appropriate mark to be awarded for each strand. The marks should then be added to give a total mark out of 50. Section 2.7.1 explains how this mark will be converted to unit grades.

Criterion	Exemplification
a1	A basic description of the meaning of customer service for any organisation is required. This may relate to the organisation they have studied or be a general description, but must be in the candidate's own words and should include different types of customer service activities.
a2	In-depth detail of customer service, covering all relevant situations in the <i>What You Need to Learn</i> section and the importance of this to their chosen organisation (as opposed to general importance to any organisation) is required for this criterion, along with examples of types of customer service activities and when and how these are provided by the chosen organisation.
a3	Candidates should show the ability to thoroughly analyse the customer service offered by their chosen organisation using technical language fluently and appropriately. The analysis should state the candidate's view of the effectiveness of customer service in the given context relating to the views of the staff of the organisation and the views of the organisation's customers. This will include recommendations for improvements to increase the benefits to the organisation.
b1	<p>Candidates should explain how their chosen organisation tries to meet the needs of a variety of customers, whether they differ socially or culturally, and should include both internal and external customers. The evidence may be provided through examples.</p> <p>Candidates should also identify how the organisation deals with complaints though the description at this level may be fairly basic and in the form of a simple sentence, e.g. 'The chips in the café were cold, but when I told them, there was no problem and they were exchanged for new hot chips'.</p> <p>Candidates should give some indication of the system used for handling complaints (e.g. how the complaint is recorded, which members of staff are involved).</p>
b2	At this level candidates should be able to develop their explanation further from the study of their chosen organisation and how that meets the needs of a variety of customers, both internal and external. This should include not only the views of the candidate but also those of the staff of the organisation and other customers, gained through a survey undertaken by the candidate. This detailed review should also include a review of the complaints procedures of the organisation and the reason for its development.
b3	A full evaluation of the way the organisation meets the needs of all the different types of customers given in the <i>What You Need to Learn</i> section is required at this level along with an analysis of the complaints procedures as they currently exist in that organisation. Candidates should recommend alternative procedures or documentation which could be used to improve the handling and processing of complaints.

Criterion	Exemplification
c1	Candidates should be able to explain why businesses are concerned about the level of customer service and the benefits an organisation can get from effective customer service, through repeat business, increased sales, customer satisfaction, though the level of explanation may be rather simplistic. They may comment on which aspects of customer service work well and which perform poorly or less well. Some of the comments may arise from discussion with staff or other customers.
c2	From their survey, they should be able to make more informed judgements in order to suggest improvements to the customer service procedures of an organisation to improve its effectiveness and may wish to recommend alternative procedures or documentation which could be used to improve customer service of the organisation overall. All types of customers should be included within this analysis.
c3	In completing an analysis of customer service procedures, candidates should suggest recommendations for improvements in these in order to increase the benefits to the organisation as listed in the <i>What You Need to Learn</i> section, relating their findings to internal and external customers. Poor customer service would be likely to reverse these benefits and candidates may also include other points not specifically mentioned in the list.
d1	Candidates should provide two examples of customer service records used by their chosen organisation, which could, for example, be telephone message slips, blank customer enrolment forms, membership records, booking forms, blank accident record forms or any suitable record maintained by the organisation covering internal or external customers.
d2	Examples of customer records used by the organisation should be as full as possible and candidates may benefit from setting up their own database of similar records and using this to insert, delete and amend records to develop their awareness of how these function in an organisation and how they may be used to develop customer service in the organisation.
d3	Using existing customer records as a base, candidates must suggest amendments to existing records or alternative ways in which these records could be used to develop the provision of customer service within the organisation.
e1	The evidence used to meet this criterion must authenticate how well the candidate communicated with a variety of customers, including listening to the customer and responding appropriately, if briefly, to the situation. The details should involve a description of what happened with each customer, or the scenario for the role play, and there should be at least three from the <i>What You Need to Learn</i> section. These should be as varied as possible for candidates to be able to demonstrate how different customers have different needs and their responses should be appropriate to the situation and the customer.

Criterion	Exemplification
e2	Candidates at this level should be able to demonstrate good presentation and communication skills and deal confidently with a variety of customers and situations. This evidence must be authenticated in a similar manner to e1 but assessor/witness testimony should include further relevant comments to confirm the candidate's ability to perform at this level and the level of skills shown.
e3	The level of response given by candidates at this standard should confirm they are successful in their form of communication, demonstrating competence and confidence in dealing with all the different customers and giving appropriate full responses to enquiries to meet the needs of the organisation and the customer.
f1	A simple description of the situation where the candidate handled a complaint must include the complaint itself, the way the customer communicated the complaint, the way the candidate dealt with the complaint and any follow-up action taken. For those candidates who have not had to deal with a customer complaint, a simple description of the action which should be taken would be sufficient. It is important that candidates realise that junior staff can only handle complaints at a simplistic level and more serious matters should be referred to a supervisor or manager.
f2	The candidate should demonstrate that a customer complaint is handled effectively and the candidate has correctly followed the procedures and policies of the organisation, whether this involves referral to a more senior member of staff or the ability to offer some form of recompense by the candidate.
f3	In providing an evaluation of their performance in customer service situations, and particularly when handling complaints, candidates would be expected to show mature reflection on their strengths and weaknesses and be able to identify areas where their performance could be improved, either with further training or more knowledge of the organisation.

The following table indicates which criteria in the *Assessment Evidence Grid* meet which assessment objectives:

Criterion	AO1	AO2	AO3
a1	✓	✓	x
a2	x	✓	x
a3	x	x	✓
b1	✓	✓	x
b2	x	✓	x
b3	x	x	✓
c1	✓	✓	✓
c2	x	x	✓
c3	x	x	✓
d1	✓	✓	x
d2	x	x	✓
d3	x	x	✓
e1	✓	✓	✓
e2	x	x	✓
e3	x	x	✓
f1	✓	✓	x
f2	x	x	✓
f3	x	x	✓

8.4.3 Resources

This specification is supported by OCR approved Heinemann Texts.

A variety of leisure and tourism textbooks highlight the principles of effective customer service, covering points such as presentation skills, listening to customers, the needs of different types of customer and the benefits of excellent customer service. Some also give examples of role play situations which Centres may wish to adapt for their candidates.

Training videos on customer service are useful, as are excerpts from many of the behind-the-scenes TV documentaries about leisure and tourism organisations such as visitor attractions, hotels, airports, tour operators, fitness/gym centres and leisure centres.




The regional tourist board for your area may be able to advise on nationally available training materials, such as the *Welcome Host* suite of training packages, and how these could be used in conjunction with this unit. Some regional tourist boards may be prepared to offer training to candidates for the *Welcome Host* qualification which would also be of some added value to candidates as this is accepted within the leisure and tourism industry.





















Candidates who are working part-time in customer service situations should be encouraged to bring in any relevant training resources used by their organisations as a focus for class discussions and brainstorm activities. However, unless the part-time jobs are within the leisure and tourism sector, any evidence used for examples of dealing with customers will not be valid. The main points raised within training packages are those which relate to customer service generally and would prove to be valuable discussion tools. Teachers may also be able to obtain copies of training materials from organisations in their own area.

The Learning and Skills Development Agency is a strategic national resource for the development of policy and practice in education and training. The agency was previously known as the Further Education Development Agency (FEDA). Their website www.lsda.org.uk provides valuable resources for all GCSEs in vocational subjects.

8.4.4 Key Skills Mapping

Details on delivery are given in Section 4.

-  this unit contains clear opportunities for generating Key Skills portfolio evidence.
-  this unit contains opportunities for developing the Key Skill, and possibly for generating portfolio evidence if teaching and learning is focused on that aim.
-  there are no obvious opportunities for the development or assessment of the Key Skill in this unit.

Criterion	C	N	IT	WO	PS	LP
1.1		x				x
1.2						
1.3				x		
2.1(a) 2.1(b)	 	x	x			x
2.2 (a) (b) (c) (d)		x x  x				
2.3		x	x	x	