

Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism



Specification

First teaching from September 2019

First certification from 2020

Issue 4

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Edexcel, BTEC and LCCI qualifications

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This specification is Issue 4. We will inform centres of any changes to this issue. The latest issue can be found on our website.

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Welcome

With a track record built over 30 years of learner success, BTEC Nationals are widely recognised by industry and higher education as the signature vocational qualification at Level 3. They provide progression to the workplace either directly or via study at a higher level. Proof comes from YouGov research, which shows that 62 per cent of large companies have recruited employees with BTEC qualifications. What's more, well over 100,000 BTEC students apply to UK universities every year and their BTEC Nationals are accepted by over 150 UK universities and higher education institutes for relevant degree programmes either on their own or in combination with A Levels.

Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure and knowledge applied in project-based assessments. They focus on the holistic development of the practical, interpersonal and thinking skills required to be able to succeed in employment and higher education.

When creating the BTEC Nationals in this suite, we worked with many employers, higher education providers, colleges and schools to ensure that their needs are met. Employers are looking for recruits with a thorough grounding in the latest industry requirements and work-ready skills such as teamwork. Higher education needs students who have experience of research, extended writing and meeting deadlines.

We have addressed these requirements with:

- a range of BTEC sizes, each with a clear purpose, so there is something to suit each learner's choice of study programme and progression plans
- refreshed content that is closely aligned with employers' and higher education needs for a skilled future workforce
- assessments and projects chosen to help learners progress to the next stage. This means some are set by you to meet local needs, while others are set and marked by Pearson so that there is a core of skills and understanding that is common to all learners. For example, a written test can be used to check that learners are confident in using technical knowledge to carry out a certain job.

We provide a wealth of support, both resources and people, to ensure that learners and their teachers have the best possible experience during their course. See *Section 10* for details of the support we offer.

A word to learners

Today's BTEC Nationals are demanding, as you would expect of the most respected applied learning qualification in the UK. You will have to choose and complete a range of units, be organised, take some assessments that we will set and mark and keep a portfolio of your assignments. But you can feel proud to achieve a BTEC because, whatever your plans in life – whether you decide to study further, go on to work or an Apprenticeship, or set up your own business – your BTEC National will be your passport to success in the next stage of your life.

Good luck, and we hope you enjoy your course.

Collaborative development

Learners completing their BTEC Nationals in Travel and Tourism will be aiming to go on to employment, often via the stepping stone of higher education. It was, therefore, essential that we developed these qualifications in close collaboration with experts from professional bodies, businesses and universities, and with the providers who will be delivering the qualifications. To ensure that the content meets providers' needs and provides high-quality preparation for progression, we engaged experts. We are very grateful to all the university and further education lecturers, teachers, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

In addition, universities, professional bodies and businesses have provided letters of support confirming that these qualifications meet their entry requirements. These letters can be viewed on our website.

Summary of Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism specification Issue 4 changes

Summary of changes made between the previous issue and this current issue	Page number
Changes made to <i>Unit 9: Visitor Attractions</i> Essential information for assessment decisions wording for Learning aims A and B, for clarity.	Pages 58-59

Summary of Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism specification Issue 2 and Issue 3 changes

Summary of changes made between the Issue 1 and Issue 3	Page number
The last paragraph of the <i>Qualification and unit content</i> section has been amended to allow centres delivering the qualification above to alter the content to reflect the context of the country where it is being delivered.	Page 5
Changes made to <i>Unit 1: The World of Travel and Tourism</i> unit content area C2 to amend from 'transport principles' to 'transport principals'.	Page 23

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

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Introduction to BTEC National qualifications for the travel and tourism sector

This specification contains the information you need to deliver the Pearson BTEC Level 3 National Certificate in Travel and Tourism. The specification signposts you to additional handbooks and policies. It includes all the units for this qualification.

This qualification is part of the suite of travel and tourism qualifications offered by Pearson. In the suite there are qualifications that focus on different progression routes, allowing learners to choose the one best suited to their aspirations.

All qualifications in the suite share some common units and assessments, allowing learners some flexibility in moving between sizes. The qualification titles are given below.

Some BTEC National qualifications provide a broad introduction that gives learners transferable knowledge and skills. These qualifications are for post-16 learners who want to continue their education through applied learning. The qualifications prepare learners for a range of higher education courses and job roles related to a particular sector. They provide progression either by meeting entry requirements in their own right or by being accepted alongside other qualifications at the same level and adding value to them.

In the travel and tourism sector these qualifications are:

Pearson BTEC Level 3 National Certificate in Travel and Tourism (603/1224/5)

Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism (601/9023/1)

Pearson BTEC Level 3 National Foundation Diploma in Travel and Tourism (601/9024/3)

Pearson BTEC Level 3 National Diploma in Travel and Tourism (603/4695/4)*

Pearson BTEC Level 3 National Extended Diploma in Travel and Tourism (603/4696/6)*.

This specification signposts all the other essential documents and support that you need as a centre in order to deliver, assess and administer the qualification, including the staff development required. A summary of all essential documents is given in *Section 7*. Information on how we can support you with this qualification is given in *Section 10*.

The information in this specification is correct at the time of publication.

* These qualifications are not eligible for performance tables in England

Total Qualification Time

For all regulated qualifications, Pearson specifies a total number of hours that it is estimated learners will require to complete and show achievement for the qualification: this is the Total Qualification Time (TQT). Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve teachers and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by teachers or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

BTEC Nationals have been designed around the number of hours of guided learning expected. Each unit in the qualification has a GLH value of 60, 90 or 120. There is then a total GLH value for the qualification.

Each qualification has a TQT value. This may vary within sectors and across the suite, depending on the nature of the units in each qualification and the expected time for other required learning. The following table show all the qualifications in this sector and their GLH and TQT values.

Qualifications, sizes and purposes at a glance

Title	Size and structure	Summary purpose
Pearson BTEC Level 3 National Certificate in Travel and Tourism	180 GLH (240 TQT) Equivalent in size to 0.5 of an A Level. 2 units, both mandatory, of which 1 is external. Mandatory content (100%). External assessment (50%).	This qualification is designed to support learners who want an introduction to the sector through applied learning and for whom an element of travel and tourism would be complementary, the qualification supports progression to higher education as part of a programme of study that includes other appropriate BTEC Nationals or A Levels.
Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism	360 GLH (480 TQT) Equivalent in size to one A Level. 4 units of which 3 are mandatory and 2 are external. Mandatory content (83%). External assessment (58%).	This qualification is designed to support learners who are interested in learning about the travel and tourism industry alongside other fields of study, with a view to progressing to a wide range of higher education courses, not necessarily in travel and tourism-related subjects. The qualification is designed to be taken as part of a programme of study that includes other appropriate BTEC Nationals or A Levels.
Pearson BTEC Level 3 National Foundation Diploma in Travel and Tourism	510 GLH (680 TQT) Equivalent in size to 1.5 A Levels. 6 units of which 4 are mandatory and 2 are external. Mandatory content (76%). External assessment (41%).	This qualification is designed to support learners who want to study travel and tourism as a one-year, full-time course, or for those wanting to take it alongside another area of complementary or contrasting study as part of a two-year, full-time study programme. The qualification would support progression to higher education if taken as part of a programme of study that included other BTEC Nationals or A Levels.

Structures of the qualifications at a glance

This table shows all the units and the qualifications to which they contribute. The full structure for this Pearson BTEC Level 3 National in Travel and Tourism is shown in *Section 2*. **You must refer to the full structure to select units and plan your programme.**

Key

Unit assessed externally	M	Mandatory units	O	Optional units
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Unit (number and title)	Unit size (GLH)	Certificate (180 GLH)	Extended Certificate (360 GLH)	Foundation Diploma (510 GLH)	Diploma* (720 GLH)	Extended Diploma* (1080 GLH)
1 The World of Travel and Tourism	90	M	M	M	M	M
2 Global Destinations	120		M	M	M	M
3 Principles of Marketing in Travel and Tourism	90	M	M		M	M
4 Managing the Customer Experience in Travel and Tourism	90			M	M	M
5 Travel and Tourism Enterprises	90			M	M	M
6 Specialist Tourism	60			O	O	O
7 Sustainable Tourism	60			O	O	O
8 The Airport Experience	60			O	O	O
9 Visitor Attractions	60		O	O	O	O
10 Passenger Transport	60			O	O	O
11 Events, Conferences and Exhibitions	60		O	O	O	O
12 Working Overseas	60			O	O	O
13 Work Experience in Travel and Tourism	60			O	O	O
14 The Cruise Industry	60				O	O
15 Recruitment and Selection in Travel and Tourism	60				O	O
16 Researching Current Travel Trends and Key Issues in Travel and Tourism	120				M	M
17 Managing Accommodation Services	90					M
18 The UK as a Tourist Destination	90					M

* The Diploma and Extended Diploma are not eligible for performance tables in England.

Qualification and unit content

Pearson has developed the content of the new BTEC Nationals in collaboration with employers and representatives from higher education and relevant professional bodies. In this way, we have ensured that content is up to date and that it includes the knowledge, understanding, skills and attributes required in the sector.

Each qualification in the suite has its own purpose. The mandatory and optional content provides a balance of breadth and depth, while retaining a degree of choice for individual learners to study content relevant to their own interests and progression choices. Also, the content may be applied during delivery in a way that is relevant to local employment needs.

The proportion of mandatory content ensures that all learners are following a coherent programme of study and acquiring the knowledge, understanding and skills that will be recognised and valued. Learners are expected to show achievement across mandatory units as detailed in *Section 2*.

BTEC Nationals have always required applied learning that brings together knowledge and understanding (the cognitive domain) with practical and technical skills (the psychomotor domain). This is achieved through learners performing vocational tasks that encourage the development of appropriate vocational behaviours (the affective domain) and transferable skills. Transferable skills are those such as communication, teamwork and research and analysis, which are valued in both higher education and the workplace.

Our approach provides rigour and balance, and promotes the ability to apply learning immediately in new contexts. Further details can be found in *Section 2*.

Centres should ensure that delivery of content is kept up to date. Some of the units within the specification may contain references to legislation, policies, regulations and organisations, which may not be applicable in the country you deliver this qualification in (if teaching outside of England), or which may have gone out-of-date during the lifespan of the specification. In these instances, it is possible to substitute such references with ones that are current and applicable in the country you deliver subject to confirmation by your Standards Verifier.

Assessment

Assessment is specifically designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to vocational qualifications in the sector. There are three main forms of assessment that you need to be aware of: external, internal and synoptic.

Externally-assessed units

Each external assessment for a BTEC National is linked to a specific unit. All of the units developed for external assessment are of 90 or 120 GLH to allow learners to demonstrate breadth and depth of achievement. Each assessment is taken under specified conditions, then marked by Pearson and a grade awarded. Learners are permitted to resit external assessments during their programme. You should refer to our website for current policy information on permitted retakes.

The styles of external assessment used for qualifications in the travel and tourism suite are:

- examinations – all learners take the same assessment at the same time, normally with a written outcome
- set tasks – learners take the assessment during a defined window and demonstrate understanding through completion of a vocational task.

Some external assessments include a period of preparation using set information. External assessments are available twice a year. For detailed information on the external assessments please see the table in *Section 2*. For further information on preparing for external assessment see *Section 5*.

Internally-assessed units

Most units in the sector are internally assessed and subject to external standards verification. This means that you set and assess the assignments that provide the final summative assessment of each unit, using the examples and support that Pearson provides. Before you assess you will need to become an approved centre, if you are not one already. You will need to prepare to assess using the guidance in *Section 6*.

In line with the requirements and guidance for internal assessment, you select the most appropriate assessment styles according to the learning set out in the unit. This ensures that learners are assessed using a variety of styles to help them develop a broad range of transferable skills. Learners could be given opportunities to:

- write up the findings of their own research
- use case studies to explore complex or unfamiliar situations
- carry out projects for which they have choice over the direction and outcomes
- demonstrate practical and technical skills using appropriate processes.

You will make grading decisions based on the requirements and supporting guidance given in the units. Learners may not make repeated submissions of assignment evidence. For further information see *Section 6*.

Synoptic assessment

Synoptic assessment requires learners to demonstrate that they can identify and use effectively, in an integrated way, an appropriate selection of skills, techniques, concepts, theories and knowledge from across the whole sector as relevant to a key task. BTEC learning has always encouraged learners to apply their learning in realistic contexts using scenarios and realistic activities that will permit learners to draw on and apply their learning. For these qualifications we have formally identified units that contain a synoptic assessment task. Synoptic assessment must take place after the teaching and learning of other mandatory units in order for learners to be able to draw from the full range of content. The synoptic assessment gives learners an opportunity to independently select and apply learning from across their programmes in the completion of a vocational task. Synoptic tasks may be in internally- or externally-assessed units. The particular unit that contains the synoptic tasks for this qualification is shown in the structure in *Section 2*.

Language of assessment

Assessment of the internal and external units for these qualifications will be available in English. All learner work must be in English. A learner taking the qualifications may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 7*.

Grading for units and qualifications

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of a range of practical skills required for employment or progression to higher education, and successful development of transferable skills. Learners achieving a qualification will have achieved across mandatory units, including external and synoptic assessment.

Units are assessed using a grading scale of Distinction (D), Merit (M), Pass (P), Near Pass (N) and Unclassified (U). The grade of Near Pass is used for externally-assessed units only. All mandatory and optional units contribute proportionately to the overall qualification grade, for example a unit of 120 GLH will contribute double that of a 60 GLH unit.

Qualifications in the suite are graded using a scale of P to D*, **or** PP to D*D*, **or** PPP to D*D*D*. Please see *Section 9* for more details. The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of learner performance and in consultation with key users of the qualification.

UCAS Tariff points

The BTEC Nationals attract UCAS points. Please go to the UCAS website for full details of the points allocated.

1 Qualification purpose

Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism

In this section, you will find information on the purpose of this qualification and how its design meets that purpose through the qualification objective and structure. We publish a full 'Statement of Purpose' for each qualification on our website. These statements are designed to guide you and potential learners to make the most appropriate choice about the size of qualification suitable at recruitment.

Who is this qualification for?

The Pearson BTEC National Extended Certificate in Travel and Tourism is intended as an Applied General qualification. It is designed for post-16 learners with an interest in travel and tourism who want to continue their education through applied learning, and who aim to progress to higher education.

The qualification is equivalent in size to one A Level and is designed to occupy one-third of a typical study programme, which could include other vocational or academic qualifications, such as another BTEC National or A Level.

This qualification gives a broad introduction to the travel and tourism industry, with an emphasis on core knowledge and fundamental skills that are transferable across other sectors.

What does this qualification cover?

The objective of the qualification is to support progression to higher education. The content of this qualification has been developed in consultation with higher education providers to ensure that it supports this progression. In addition, employers and professional bodies have been involved and consulted in order to confirm that the content is appropriate and consistent with current practice.

This qualification includes three mandatory units covering the following content areas.

- The travel and tourism industry – the travel and tourism industry in the UK is growing and is of major importance to the economy. Learners will develop the skills needed to examine, interpret and analyse a variety of statistics that measure the importance of tourism to the UK.
- Different types of destinations and their importance – learners will investigate the features and appeal of global destinations.
- Principles of marketing in travel and tourism – learners will explore how to develop a successful marketing plan for use by travel and tourism organisations to attract and engage with customers using research data.

Learners select one optional unit to support their progression to travel and tourism and other courses in higher education.

What could this qualification lead to?

In addition to the travel and tourism sector-specific content, the requirements of the qualification will mean that learners develop transferable skills, which are highly regarded by higher education providers and employers. The qualification will give learners transferable knowledge, understanding and broad skills such as communicating and presenting ideas.

All of the content in the qualification will help prepare learners for further study.

The qualification carries UCAS points and is recognised by higher education providers as contributing to meeting admission requirements for many courses, if taken alongside other qualifications as part of a two-year programme of learning. It combines well with a large number of subjects at Level 3, whether academic or vocational.

The qualification can be taken as part of a diverse programme, leaving progression options fully open. It can give context to subjects that would benefit from some sector background. This will depend on the combination of qualifications chosen, for example if taken alongside:

- BTEC National Diploma in Enterprise – for progression to business-related courses
- A Levels in History or Modern Foreign Languages.

Learners should always check the entry requirements for degree programmes with the specific higher education providers.

How does the qualification provide employability skills?

In the BTEC National units, there are opportunities during the teaching and learning phase to give learners practice in developing employability skills. Where employability skills are referred to in this specification, we are generally referring to skills in the following three main categories:

- **cognitive and problem-solving skills:** using critical thinking, approaching non-routine problems applying expert and creative solutions
- **interpersonal skills:** communicating, working collaboratively, negotiating and influencing, self-presentation
- **intrapersonal skills:** self-management, adaptability and resilience, self-monitoring and development.

There are also specific requirements in some units for assessment of these skills where relevant, for example, where learners are required to undertake real or simulated activities.

How does the qualification provide transferable knowledge and skills for higher education?

All BTEC Nationals provide transferable knowledge and skills that prepare learners for progression to university. The transferable skills that universities value include:

- the ability to learn independently
- the ability to research actively and methodically
- the ability to give presentations and be active group members.

BTEC learners can also benefit from opportunities for deep learning where they are able to make connections among units and select areas of interest for detailed study. BTEC Nationals provide a vocational context in which learners can develop the knowledge and skills required for particular degree courses, including:

- effective writing
- analytical skills
- creative development.

2 Structure

Qualification structure

Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism

Mandatory units

There are three mandatory units, one internal and two external. Learners must complete and achieve at Near Pass grade or above in all mandatory external units and achieve a Pass or above in all mandatory internal units.

Optional units

Learners must complete at least one optional unit.

Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism				
Unit number	Unit title	GLH	Type	How assessed
Mandatory units – learners complete and achieve all units				
1	The World of Travel and Tourism	90	Mandatory	External
2	Global Destinations	120	Mandatory	External
3	Principles of Marketing in Travel and Tourism	90	Mandatory and Synoptic	Internal
Optional units – learners complete 1 unit				
9	Visitor Attractions	60	Optional	Internal
11	Events, Conferences and Exhibitions	60	Optional	Internal

External assessment

This is a summary of the type and availability of external assessment, which is of units making up 58 per cent of the total qualification GLH. See *Section 5* and the units and sample assessment materials for more information.

Unit	Type	Availability
Unit 1: The World of Travel and Tourism	<ul style="list-style-type: none">• Written examination set and marked by Pearson.• 1.5 hours.• 75 marks.	Jan and May/June First assessment May/June 2020
Unit 2: Global Destinations	<ul style="list-style-type: none">• A task set and marked by Pearson and completed under supervised conditions.• Learners are given information two weeks before a supervised assessment period in order to carry out research.• The supervised assessment period is undertaken in a single session of three hours.• 60 marks.	Jan and May/June First assessment May/June 2020

Synoptic assessment

The mandatory synoptic assessment requires learners to apply learning from across the qualification to the completion of a defined vocational task. Within the assessment for *Unit 3: Principles of Marketing Travel and Tourism* learners develop a marketing plan for a new product or service for a travel and tourism organisation or global destination.

Learners complete the task selecting learning and applying their knowledge and understanding of factors influencing customer choices in travel and tourism. They also consider marketing approaches by different travel and tourism organisations and analyse data on how a new product or service meets industry and learner needs.

In assessing the unit assignments will require learners to select from and apply their learning from across their programme. The unit provides further information.

Employer involvement in assessment and delivery

You are encouraged to give learners opportunities to be involved with employers. See *Section 4* for more information.

3 Units

Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your learners for assessment. The units help you to undertake assessment and quality assurance effectively.

Each unit in the specification is set out in a similar way. There are two types of unit format:

- internal units
- external units.

This section explains how the units work. It is important that all teachers, assessors, internal verifiers and other staff responsible for the programme review this section.

Internal units

Section	Explanation
Unit number	The number is in a sequence in the sector. Numbers may not be sequential for an individual qualification.
Unit title	This is the formal title that we always use and it appears on certificates.
Level	All units are at Level 3 on the national framework.
Unit type	This shows if the unit is internal or external only. See structure information in <i>Section 2</i> for full details.
GLH	Units may have a GLH value of 120, 90 or 60. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures etc.
Unit introduction	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
Learning aims	These help to define the scope, style and depth of learning of the unit. You can see where learners should be learning standard requirements ('understand') or where they should be actively researching ('investigate'). You can find out more about the verbs we use in learning aims in <i>Appendix 2</i> .
Summary of unit	This new section helps teachers to see at a glance the main content areas against the learning aims and the structure of the assessment. The content areas and structure of assessment are required. The forms of evidence given are suitable to fulfil the requirements.
Content	This section sets out the required teaching content of the unit. Content is compulsory except when shown as 'e.g.'. Learners should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.

Section	Explanation
Assessment criteria	<p>Each learning aim has Pass and Merit criteria. Each assignment has at least one Distinction criterion.</p> <p>A full glossary of terms used is given in <i>Appendix 2</i>. All assessors need to understand our expectations of the terms used.</p> <p>Distinction criteria represent outstanding performance in the unit. Some criteria require learners to draw together learning from across the learning aims.</p>
Essential information for assignments	<p>This shows the maximum number of assignments that may be used for the unit to allow for effective summative assessment, and how the assessment criteria should be used to assess performance.</p>
Further information for teachers and assessors	<p>The section gives you information to support the implementation of assessment. It is important that this is used carefully alongside the assessment criteria.</p>
Resource requirements	<p>Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see <i>Section 10</i>.</p>
Essential information for assessment decisions	<p>This information gives guidance for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard. This section contains examples and essential clarification.</p>
Links to other units	<p>This section shows you the main relationship among units. This section can help you to structure your programme and make best use of materials and resources.</p>
Employer involvement	<p>This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.</p>

External units

Section	Explanation
Unit number	The number is in a sequence in the sector. Numbers may not be sequential for an individual qualification.
Unit title	This is the formal title that we always use and it appears on certificates.
Level	All units are at Level 3 on the national framework.
Unit type	This shows if the unit is internal or external only. See structure information in <i>Section 2</i> for full details.
GLH	Units may have a GLH value of 120, 90 or 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit.
Unit introduction	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
Summary of assessment	This sets out the type of external assessment used and the way in which it is used to assess achievement.
Assessment outcomes	These show the hierarchy of knowledge, understanding, skills and behaviours that are assessed. Includes information on how this hierarchy relates to command terms in sample assessment materials (SAMs).
Essential content	For external units all the content is obligatory, the depth of content is indicated in the assessment outcomes and sample assessment materials (SAMs). The content will be sampled through the external assessment over time, using the variety of questions or tasks shown.
Grade descriptors	We use grading descriptors when making judgements on grade boundaries. You can use them to understand what we expect to see from learners at particular grades.
Key terms typically used in assessment	These definitions will help you analyse requirements and prepare learners for assessment.
Resources	Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see <i>Section 10</i> .
Links to other units	This section shows the main relationship among units. This section can help you to structure your programme and make best use of materials and resources.
Employer involvement	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

Index of units

This section contains all the units developed for this qualification. Please refer to *page 4* to check which units are available in all qualifications in the travel and tourism sector.

Unit 1:	The World of Travel and Tourism	17
Unit 2:	Global Destinations	31
Unit 3:	Principles of Marketing in Travel and Tourism	39
Unit 9:	Visitor Attractions	51
Unit 11:	Events, Conferences and Exhibitions	61

Unit 1: The World of Travel and Tourism

Level: **3**

Unit type: **External**

Guided learning hours: **90**

Unit in brief

This unit provides the foundation for learners to study other units in travel and tourism. They will explore the key components and scale of the industry, using data to analyse key trends and their impact.

Unit introduction

The travel and tourism industry in the UK is growing and is of major importance to the economy. In this unit, you will develop the skills needed to examine, interpret and analyse a variety of statistics that measure the importance of tourism to the UK. There are many influences on the industry and they are changing all the time. Some of them are within the control of travel organisations, while others are beyond their control. You will need to know how organisations react to changes and trends to determine their present and future operating policies.

You will gain an understanding of the scope of the industry, its terminology and its key components. Travel and tourism is a business with the customer at the forefront. Different types of organisation have different roles and offer a range of products and services to many different types of customer. You will need to understand how the organisations work together to benefit both themselves and their customers and you should be able to name examples of the key organisations in all sectors.

This unit will enable you to progress to higher-education courses or to a career in the travel and tourism industry by developing your knowledge of how to analyse travel and tourism data and make decisions based on information from a variety of sources.

Summary of assessment

This unit is assessed by a written examination set and marked by Pearson.

The examination will be 1.5 hours in length.

The number of marks for the examination is 75.

The assessment availability is January and May/June each year. The first assessment availability is May/June 2020.

Sample assessment materials will be available to help centres prepare learners for assessment.

Assessment outcomes

AO1 Demonstrate knowledge and understanding of the travel and tourism industry, types of tourism and organisations involved

Command words: complete, describe, give, identify, outline

Marks: ranges from 2 to 4 marks

AO2 Apply knowledge and understanding of the travel and tourism industry and factors affecting the industry to real-life travel and tourism scenarios

Command words: analyse, assess, calculate, describe, discuss, evaluate, explain

Marks: ranges from 4 to 12 marks

AO3 Analyse information and data from the travel and tourism industry, identifying trends and the potential impact of different factors on the industry and its customers

Command words: analyse, assess, discuss, evaluate

Marks: ranges from 6 to 12 marks

AO4 Evaluate how information and data can be used by the travel and tourism industry to make decisions that affect organisations and customers

Command words: analyse, assess, discuss, evaluate

Marks: ranges from 6 to 12 marks

AO5 Make connections between the factors that influence the travel and tourism industry and how the industry responds to minimise the potential impact on organisations and customers

Command words: analyse, assess, discuss, evaluate

Marks: ranges from 6 to 12 marks

Essential content

The essential content is set out under content areas. Learners must cover all specified content before the assessment.

A Types of travel and tourism

There are different types of tourism and many purposes for travel. These will vary according to customer type and need.

A1 Types of tourism

Tourism – a trip away from home for one night or more:

- domestic – taking holidays and trips inside your country of residence
- inbound – visitors from overseas coming into the country
- outbound – tourists leaving their country of residence to travel to another country.

A2 Types of travel

- Leisure travel – travelling for pleasure, enjoyment, relaxation or special interests:
 - short breaks – city breaks, countryside breaks, stag and hen
 - holidays – package, independent, cruises
 - special events – major sporting occasions, seasonal events.
- Corporate travel – associated with work or job but it will take place away from the usual place of work. It may or may not involve an overnight stay.
 - Meetings, conferences, exhibitions.
 - Training – self or others.
 - Short-term work contracts – elsewhere in the UK or overseas.
 - Incentive travel – defined as a trip offered as reward for good performance in your job.
- Specialist travel – this is usually linked with the purpose of travel – a hobby, sport, interest, or to meet specific needs of the type of customer:
 - adventure
 - health
 - education
 - heritage, culture
 - gap year
 - conservation, sustainable tourism, responsible travel
 - special interests/hobbies/sports
 - weddings/honeymoons.
- Visiting Friends and Relatives (VFR):
 - may be domestic, inbound or outbound
 - involves overnight stay, usually in home of friend or relative
 - will involve travelling away from home area or region
 - may involve travelling to another country
 - could be for leisure or business purpose.
- Day trips – visits that do not involve an overnight stay:
 - visitor attractions
 - cities for specialist shopping or events
 - countryside for relaxation or activities.

A3 Types of travel and tourism customer

- Individuals and couples, families with a range of ages and structures.
- Groups, educational, senior citizens, special interest.
- Corporate travellers.
- Customers with specific requirements – different languages or cultures, specific needs – visual, hearing or mobility.

B The types of travel and tourism organisations, their roles and the products and services they offer to customers

B1 Ownership and operating aims

Each type of organisation has different aims that it needs to achieve.

- Private:
 - characteristics – owned by private individual(s) or company, may be a public limited company (PLC) on stock market, could be large multinational company, may be SME (small to medium-sized enterprise), will be staffed by paid employees
 - aims – usually financial, to make a profit, to increase market share, to increase turnover, to improve or maintain its image, to increase and diversify the range of products/services offered to customers
 - organisations – tour operators, travel agents, most transport organisations and hubs, most large visitor attractions, most accommodation providers.
- Public:
 - characteristics – owned or funded by the government – local or national, will be staffed by paid employees but may also be supported by volunteers
 - aims – to provide a service to the public, to use funding appropriately, to maintain best quality service, to financially break-even, to ensure that service levels are maintained to reinvest profit to improve services
 - organisations – tourist information centres, tourist boards, some smaller visitor attractions, some local transport organisations, most regulatory bodies, government bodies.
- Voluntary sector:
 - characteristics – funded by grants, donations, legacies, entry fees, staffed by volunteers though larger organisations, will also have paid employees or tenants, most have charitable status
 - aims – to preserve or protect the environment, buildings, landscape features; to campaign or lobby against inappropriate developments; conservation; sustainability
 - organisations – some visitor attractions, including natural; some transport; charities.

B2 The key sectors of the travel and tourism industry – components of their role, and the products and services they offer to different types of customer

Each key sector will comprise a range of organisations, from small, local companies to large, multinational businesses, and examples of organisations for each sector will need to be provided. Products and services may be tangible or intangible.

- Transport principals:
 - components:
 - air – scheduled, charter, low cost or no-frills
 - sea – ferry, cruises
 - road – bus, coach, hire car, private car, taxi
 - rail – local, national and international, high speed
 - role – to provide transport between destinations, to ensure safety
 - products and services – transport for passengers and luggage, catering, entertainment, information, shopping.
- Transport hubs and gateways:
 - components:
 - airports
 - rail and coach stations
 - ferry and cruise ports
 - role – to provide access for passengers to transportation, to ensure safety
 - products and services – check-in desks, information, catering, shopping, lounge facilities.

- Tour operators:
 - components:
 - mass-market, package
 - special interest, niche, luxury
 - tailor-made, dynamic packages
 - role – to assemble and operate package holidays comprising two or more products or services at an inclusive price. The packages then can either be sold directly or through travel agents
 - products and services – package holidays, accommodation, transfers, excursions, information on destinations, representative service in resorts.
- Travel agents:
 - components:
 - retail or high street, multiple, miniple, independent, franchised, specialist
 - online or web-based
 - call centres
 - business, conference and incentive
 - role – to provide expert advice and guidance; arranging and booking transport and package holidays or individual components and ancillary items
 - products and services – information on destinations and transport; holiday brochures; all types of package holidays; individually booked components – tailor-made packages; accommodation; flight only; ferries; cruises; coach tours; transfers, both in UK and overseas; excursions; holiday insurance; foreign exchange; passports, visas and health advice to travellers.
- Visitor attractions:
 - components:
 - natural areas – national parks
 - natural features – beaches, caves, cliffs, mountains, hills, waterfalls, islands, forests
 - purpose built or man-made – theme parks, museums, art galleries
 - historical or heritage – castles, walls, ruins, towers, monuments, religious, houses, palaces
 - sports – spectating, participating, stadium tours
 - special events – markets, festivals, parades, exhibitions
 - role – to provide entertainment, education, recreation, hospitality, special events, and facilities for visitors – parking
 - products and services – rides, experiences, interpretation, guidebooks, information boards, exhibits, guided tours, educational talks, hospitality, gift and souvenirs shops, catering.
- Accommodation:
 - components – catered accommodation
 - hotels (star rated, spa, golf resorts)
 - bed and breakfasts, guest houses, chalets (in ski resorts)
 - youth hostels
 - components – self-catered or non-catered accommodation
 - cottages, apartments, boats, log cabins, chalets
 - motels, aparthotels
 - caravans, static or touring
 - motorhomes
 - tents, including glamping, yurts, tepees
 - role – to provide different accommodation options according to customer type, needs and budget
 - products and services:
 - catered – room, reception, restaurant and bar, housekeeping, leisure facilities, gym or health club, conference and business facilities, entertainment
 - self-catered – rooms, kitchen, tent or caravan pitch, entertainment, sports facilities, amenities such as laundry and showers.

- Trade associations, government departments and regulatory bodies:
 - components:
 - ABTA, The Travel Association
 - Association of National Tourist Office Representatives (ANTOR)
 - Association of Independent Tour Operators (AITO)
 - Civil Aviation Authority (CAA) which issues the Air Travel Organisers Licence (ATOL)
 - International Air Transport Association (IATA)
 - Department for Culture Media and Sport (DCMS)
 - Foreign and Commonwealth Office (FCO)
 - roles – to provide information and support to organisations; to define, apply and ensure compliance with rules and regulations which ensure safe operations; to protect customers financially; to ensure high standards; to lobby the government on behalf of customers and organisations; to repatriate travellers
 - products and services – logos, charters, agreements, bonds, repatriation arrangements, arbitration service, compensation schemes.
- Information and promotional service providers (names to be used as current at the time of teaching):
 - components:
 - United Nations World Tourism Organisation (UNWTO)
 - VisitBritain, VisitEngland, Tourism NI (Northern Ireland), VisitScotland, VisitWales
 - destination management organisations (DMO)
 - regional
 - local tourist information centre
 - role – to provide information to organisations and customers or prospective customers; to market and promote destinations and organisations; to sell products, merchandise and services relating to location; to research and produce statistics
 - products and services – brochures, leaflets, websites, mailing lists, merchandise.

B3 Interrelationships and interdependencies in the travel and tourism industry

Organisations in different sectors interrelate and some larger organisations have integrated either horizontally and/or vertically. These have potential advantages and disadvantages to both the organisations and their customers.

- Distribution channels – direct to customer, through an intermediary company.
- Interrelationships – defined as ‘organisations that work together to benefit them both’.
- Interdependencies – defined as ‘organisations that rely on each other to enable them to provide a better product or service to the customer’.
- Potential advantages of interrelationships and interdependencies – shared costs and economies of scale, increased sales, better image, reputation, customer care, more customers, more income.
- Potential disadvantages of interrelationships and interdependencies – loss of individual image, less personal customer service, shared commission on sales, effects of poor service by one organisation may potentially impact on the other.
- Horizontal integration – where an organisation buys or merges with another organisation of the same type to enable it to offer a wider variety of products and services.
- Vertical integration – when an organisation buys or merges with another organisation of a different type to enable it to control more sectors of the market.

B4 Technology in travel and tourism

Technology, including mobile and digital technology, is used by different organisations in the industry, and there are potential advantages and disadvantages of its use to both businesses and their customers.

- Technology for communication, booking and promotion:
 - ebrochures and websites
 - reviews, blogs, virtual tours, videos
 - mailshots, popups, adverts
 - making and confirming bookings
 - emailing tickets and vouchers
 - apps for mobile and digital devices.
- Technology specific to different organisations:
 - visitor attractions – multimedia presentations, animatronics, interpretation, fast-track tickets, webcams
 - transport hubs and gateways – self-service check-in, body and baggage scanners
 - accommodation, for check-in, for in-room entertainment, for information
 - travel agents, transport principals and tour operators – for eticketing, mticketing, payment systems, displaying availability, seat selection.

C The scale of the travel and tourism industry

Travel and tourism is one of the largest industries in the service sector in the UK. The scale of the industry can be measured locally, nationally and internationally, in terms of employment, visitor numbers, income and spending, and trends analysis, including how these change over time and the reasons for the changes.

C1 Importance of the UK as a global destination

- Tourist numbers:
 - world ranking
 - tourist arrivals
 - main generating areas.
- Economic importance:
 - value of inbound tourism, tourism receipts and employment
 - contribution of tourism to UK balance of payments and gross domestic product (GDP)
 - the UK's role in international tourism.

C2 Employment in travel and tourism

The scale of the travel and tourism industry can also be measured by using statistics on employment and trends. Employment includes the numbers and types of staff directly employed in the industry at all levels, including business support functions. It will also include indirect employment in industries that the travel and tourism industry depends on for support. Examples of job roles for each will need to be given.

- Direct employment in travel and tourism:
 - transport principals
 - transport hubs and gateways
 - tour operators
 - travel agents
 - visitor attractions
 - accommodation
 - trade associations and regulatory bodies
 - information and promotional services.

- Indirect employment in organisations that support travel and tourism:
 - insurance companies
 - brochure and website content researchers and maintenance
 - suppliers for retail, catering and hospitality
 - souvenir shops and manufacturers
 - travel journalism.
- Roles:
 - customer-facing, including telephone and web-based roles
 - support or administration
 - graduate programmes or trainees
 - managerial and supervisory.

C3 Visitor numbers

The scale of the industry can be measured by looking at visitor numbers, and these can be broken down into types of tourism. Statistics showing trends in types of tourism are a good way of analysing growth and decline.

- Visitor numbers by type of tourism:
 - inbound
 - outbound
 - domestic
 - business
 - VFR
 - day trips.
- Visitor numbers by other factors:
 - type of transport
 - country of origin or destination
 - accommodation type
 - region or city visited
 - by types of activities carried out.
- Trends:
 - growth areas of origin and destination
 - changing purpose of visit
 - transport type used
 - length of stay
 - increase and decline in popularity of destinations, tourism types.

C4 Income and spending

Income can relate to both individual organisations and to the income of a country.

- Income and turnover:
 - contribution to GDP – defined as the value of a country's economy
 - leakage – defined as tourist income that comes into a country but is not retained by that country
 - multiplier effect – defined as direct spending by tourists, which is circulated through the economy on indirect products and services
 - profit margins and commission levels.

Statistics on the level of spending and what tourists spend their money on are also a good indicator of the value of tourism to the economy.

- Spending on:
 - accommodation by type
 - food, drink, souvenirs by type
 - transport – local and arrival
 - entertainment
 - admission fees to attractions.

D Factors affecting the travel and tourism industry

There are many factors that affect the growth and operation of organisations in the travel and tourism industry as detailed below. Examples of appropriate product development will need to be given.

D1 Product development and innovation

These factors have been responsible for the rapid growth in the travel and tourism industry from 1950 to the present day, and are significant for its current and future operations.

- Development and innovation:
 - larger and faster transportation; airport growth; improved accessibility to destination; improved facilities both on transport and in terminals, hubs and gateways
 - increased range of choice in accommodation and increased variety of attractions
 - booking systems, computers, online, mobile, rise of call centres, advances in Computer Reservation System (CRS) and Global Distribution System (GDS) for agents and operators, comparison websites
 - technology, including potential hackers and system failures and maintaining security of data.
- Media factors:
 - increased TV coverage, film locations, adverts
 - social media usage, by organisations and customers
 - influence of social media in research and customer reviews and opinions
 - media coverage of events
 - importance of managing – bad and good press, incidents, image.

D2 Other factors affecting organisations in the travel and tourism industry

There are two types of factors that affect travel and tourism organisations. One type of factor is external, which is a factor outside the control of the organisation. The other type of factor is internal, which is a factor within the control of the organisation.

- Economic factors:
 - recession or growth
 - currency exchange rates and fluctuations
 - available disposable income as a result of changes to mortgage rates, inflation and unemployment rates
 - world oil prices.
- Social and lifestyle factors:
 - changing family structure, one parent families
 - rise of the 'grey' market – increased proportion of retired people
 - changing working patterns
 - current fashions and trends
 - holiday allowance and amount of holiday with pay.

- Government legislation in both the UK and in destinations, relating to:
 - health and safety
 - airport tax/APD (air passenger duty)
 - passport and visa requirements
 - data protection requirements.
- Safety and security:
 - terrorist attacks
 - war, civil unrest
 - security measures – on transport, at terminals, at destinations, at events
 - transport disasters and crashes and safety concerns
 - health – reactions to disease outbreaks and prevalence of disease
 - e-safety.
- Environmental and climatic:
 - climate change
 - the importance of sustainability
 - extreme weather events – floods, landslides, hurricanes, cyclones
 - natural disasters – volcanic eruptions, earthquakes, tsunamis.

D3 Responses of travel and tourism organisations to external and internal factors

- Competitive pricing.
- Increased range and new products and services to match changing and emerging markets.
- Membership of trade organisations for financial protection and repatriation.
- Fuel surcharges on holidays and flights.
- Increased security measures for maintaining security of data and prevention of hacking and system failures.
- Product diversification or specialisation.
- Increased research – local, national and international.
- Updated technology and staff training on legislation, compliance and new systems.
- Public relations management.
- Investment or upgrading facilities or introducing new facilities.
- Variable opening times and flexible staffing arrangements.
- Crisis management and major incident plan.

Grade descriptors

To achieve a grade, learners are expected to demonstrate these attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

Level 3 Pass

Learners will demonstrate knowledge and understanding of the scope of the travel and tourism industry, its terminology and its key components, the types of travel and tourism organisations, their roles and the products and services they offer to customers. Learners can appreciate the challenges faced by individuals and organisations in the travel and tourism industry and how these have been influenced by trends.

Learners will be able to use data to show understanding of the factors influencing the industry. They will have a sound understanding of the scale of the industry and the many factors that affect the growth and operation of organisations in the travel and tourism industry.

Level 3 Distinction

Learners will apply principles and critically evaluate information in the travel and tourism industry to determine and analyse appropriate courses of action. They can apply relevant concepts and models in order to present reasoned evaluations in realistic scenarios. Learners make appropriate judgements and present fully justified recommendations for courses of action based on the analysis of data and information to justify trends. They can use data to support justified conclusions and they can evaluate the potential impact of the many factors that affect the growth and operation of organisations in the travel and tourism industry.

Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Analyse	Learners present the outcome of methodical and detailed examination either by breaking down: <ul style="list-style-type: none"> • a theme, topic or situation in order to interpret and study the relationships between the parts and/or • information or data to interpret and study key trends and interrelationships.
Assess	Learners present a careful consideration of varied factors or events that apply to a specific situation, or identify those which are the most important or relevant and arrive at a conclusion.
Calculate	Learners work out an answer, usually by adding, multiplying, subtracting or dividing. Sometimes the use of a formula is required.
Complete	Learners enter relevant information or data as required to a table or diagram.
Describe	Learners' work gives a clear objective account in their own words showing recall, and in some cases application, of the relevant features and information about a subject.
Discuss	Learners consider different aspects of: <ul style="list-style-type: none"> • a theme or topic; • how they interrelate; and • the extent to which they are important. A conclusion is not required.
Evaluate	Learners' work draws on varied information, themes or concepts to consider aspects such as: <ul style="list-style-type: none"> • strengths or weaknesses • advantages or disadvantages • alternative actions • relevance or significance. Learners' enquiries should lead to a supported judgement showing relationship to its context. This will often be in a conclusion.
Explain	Learners' work shows clear details and gives reasons and/or evidence to support an opinion, view or argument or explain how conclusions are reached. Learners show that they comprehend the origins, functions and objectives of a subject, and its suitability for purpose.

Command or term	Definition
Give	Learners provide examples.
Identify	Learners indicate the main features or purpose of something by recognising it and/or being able to discern and understand facts or qualities.
Outline	Learners' work provides a summary, overview or a brief description of something.

Links to other units

This is an introductory unit and links to all other units in the qualification.

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- work experience
- exemplar materials
- support from local travel and tourism staff as mentors.

Unit 2: Global Destinations

Level: **3**

Unit type: **External**

Guided learning hours: **120**

Unit in brief

Learners investigate and analyse information regarding the features and appeal of global destinations, travel planning, and the factors and trends affecting the changing popularity of global destinations.

Unit introduction

Global destinations are a key aspect of travel and tourism and their appeal is strongly influenced by factors such as their location, access and changing trends.

In this unit, you will use a range of resources to investigate the location and features of global destinations and explain the features that give appeal to global destinations and support different types of tourism. You will evaluate how travel plans/routes/itineraries meet customer needs. You will investigate consumer trends and the reasons the popularity of global destinations may change.

This unit will enable you to progress to higher-education courses by developing your knowledge of how to carry out research and make decisions based on information from a variety of sources. It will also help prepare you for a career in the travel and tourism industry as you apply geographical knowledge and evaluate travel and tourism data in order to meet a given brief.

Summary of assessment

This unit is assessed under supervised conditions. Learners will be given information two weeks before a supervised assessment period to carry out research.

The supervised assessment period is a maximum of three hours in a single session as timetabled by Pearson. During the supervised assessment session, learners will be given a set task that will assess their ability to explain features of destinations and recommend their suitability to meet different customer needs. Learners will also be assessed on their ability to assess travel plans and justify how they meet customer needs. The task will assess learners' ability to evaluate the appeal and popularity of destinations.

Pearson sets and marks the task.

The number of marks for the unit is 60.

The assessment availability is January and May/June each year. The first assessment availability is May/June 2020.

Sample assessment materials will be available to help centres prepare learners for assessment.

Assessment outcomes

A01 Demonstrate knowledge and understanding of the location, features and appeal of global destinations

A02 Apply knowledge and understanding of the features that contribute to the appeal of global destinations and the types of tourism and activities they support

A03 Evaluate information to make informed decisions about the suitability of travel plans, routes and itineraries to meet the needs of specified customers

A04 Be able to evaluate factors and consumer trends that influence the popularity and appeal of global destinations, synthesising ideas and evidence to support recommendations

Essential content

The essential content is set out under content areas. Learners must cover all specified content before the assessment.

A Geographical awareness, locations and features giving appeal to global destinations

Specific terms and features are used to describe the location of destinations on a global scale.

A1 Geographical awareness

- Geographical scale: hemispheres, continents, countries, regions.
- Location in relation to:
 - position – coastal, inland, islands, oceans, seas
 - major rivers, lakes, estuaries, mountain ranges, forests
 - altitude, height above sea level
 - latitude, equator, poles, Tropic of Cancer, Tropic of Capricorn.

A2 Features and appeal of destinations

The appeal of global destinations often depends on the features that can be found there.

- Natural attractions: climate, landscape and topography, waterfalls, flora and fauna; natural phenomena – Northern Lights, volcanoes, geysers.
- Weather: interpretation of precipitation, temperature charts, hours of sunshine, seasonal variations.
- Built attractions: cultural heritage, historical sites, religious sites, museums, theme parks.
- Tourist facilities and amenities, their availability and standards:
 - transport and communication links
 - types of accommodation – serviced, self-catering
 - events, entertainment
 - local culture, including food and drink
 - facilities provided for activities, for business, leisure.
- Stage of development as a tourist destination: stages in Butler's tourist area life cycle (TALC) model – exploration, involvement, development, consolidation, stagnation, decline, rejuvenation; emerging, mature

A3 Appeal and types of tourism

Features of global destinations support different types of tourism and tourist activities.

- Cultural: events, ceremonies, festivals; home stays; responsible tourism; dark tourism; religious pilgrimage.
- Leisure: relaxation – swimming, sunbathing; shopping, hobbies; sightseeing – tours, cruises, weddings and honeymoons.
- Nature: safaris, trekking, bird watching; ecotourism; conservation.
- Sports: water based – sailing, scuba diving, windsurfing, surfing, fishing; land based – cycling, walking, skiing; spectator sports – golf, tennis, cycling, rugby, football; major events – Olympics®, FIFA World Cup™, Grand Prix™, Six Nations®.
- Adventure: rock climbing, mountaineering, white water rafting, abseiling.
- Wellness: yoga, spiritual, detox, spas, retreats; health, fitness, lifestyle, mind and body.
- Business: meetings, incentives, conferences and events (MICE).
- Education: research, study visits, exchange.

B Potential advantages and disadvantages of travel options to access global destinations

Global destinations have become more accessible via a network of different transport routes and providers. There is now a wide range of travel and transport options available and each has their own advantages and disadvantages depending on a variety of factors, including customer needs.

B1 Different types of gateways and transport hubs and their facilities

- Major and emerging international gateways and their facilities:
 - air – airports and airport codes
 - train terminals – termini for international connections
 - sea ports – ferry ports, cruise ports.
- Transport hubs:
 - integrated transport systems and services.

B2 Potential advantages and disadvantages of travel routes and transport providers

- Modes of transport, potential advantages and disadvantages – air, road, rail, sea.
- Travel routes – departure and arrival gateways, travel times, connections and transfers.
- Transport providers, potential advantages and disadvantages:
 - air carriers – national flag carriers, scheduled, chartered, budget, luxury, private jet
 - ferry operators
 - cruise companies – international, national, regional, local, ocean, river
 - rail operators – scheduled, luxury, heritage, long distance
 - overland travel providers – coach operators, bus companies, safari, expedition, local transport services, taxi.

C Travel planning, itineraries, costs and suitability matched to customer needs

Travel planning involves researching travel routes, transport options and costs. This information is often presented as an itinerary or plan. Potential advantages and disadvantages can be matched for suitability for different types of customers.

C1 Travel planning and the potential advantages and disadvantages of transport options

- Sources of information for travel planning: maps, atlases, brochures, travel guides, websites, timetables, travel agents, visitor centres, tourist boards, government advice.
- Convenience: direct services, length of journey, total cost of journey, transfers, connections and transit, number of changes, waiting times, layovers, stopovers.
- Timings: 24-hour clock, adjustments for travel across time zones, direction of travel (east–west or west–east), Prime/Greenwich Meridian and International Date Line (IDL).
- Services and level of comfort: food, drink, entertainment, communications, choice of travel class, seating, legroom.
- Safety and security: reliability, safety record, previous incident measures, training, evacuation, baggage checks, transit, CCTV, security personnel.
- Risk assessments: identifying potential risk/danger, Foreign and Commonwealth Office (FCO) advice, preventing accident/injury, contingency plans.

C2 Understanding of travel itineraries

- General information included in a travel itinerary:
 - number in the party
 - dates and duration of the trip
 - total costs, cost breakdown, extras, supplements, currency requirements, insurance
 - entry and visa requirements, health advice, vaccines, medications
 - type of trip – one centre, two centre, guided tour, independent
 - contact details of travel organiser/agent, emergency contact details.
- Outward travel details – departure date, time, travel to departure point, method of travel, duration of journey, transport provider(s).

- Transport from departure point:
 - service booked, codes, terminals
 - embarkation details, security, passport checks
 - seating arrangements, catering, assistance
 - travel time to destination gateway, adjustments across time zones, method of travel, duration, provider.
- Onward travel arrangements:
 - duration, method of travel, provider(s)
 - time of arrival at accommodation, location of accommodation, room and board arrangements
 - activities – planned excursions, tours, day trips, optional extras, leisure time.
- Return travel details – departure date, time, travel to departure point, method of travel, duration of journey, transport provider.

C3 Cost factors

- Total cost: per person, total cost for the group, breakdown of component costs.
- Discounts: booking terms and conditions, discount types, percentages, advance bookings, integrated travel, free places, reward schemes.
- Supplements: under occupancy, cabins/rooms with views, luggage charges, pre-allocated seating arrangements, level of service, fuel surcharges, excursions, group/private transfers, booking fees, insurance.
- Exchange rates, currency conversions, managing fluctuations, restrictions.

C4 Type of customers and their needs

- Different types of customers: families, senior citizens, couples, young people, customers with special interests, corporate travellers, groups, different ages.
- General needs: speed, cost, time, length of journey.
- Specific needs: access, restricted mobility, wheelchair users, hearing impairment, visual impairment, medical, health conditions, language, unaccompanied minors, infants, babies, phobias, travelling with sports equipment and oversized baggage.
- Purpose of travel: leisure, Visiting Friends and Relatives (VFR), business.

D Consumer trends, motivating and enabling factors and their potential effect on the popularity and appeal of global destinations

Consumer trends relate to how the views, needs and requirements of customers may change over time and, as a consequence, some global destinations may become more or less popular. Customer choice may also be influenced by motivating and enabling factors.

D1 Consumer trends affecting the appeal of global destination

- Changing demographics – aging society – silver surfers, grey gappers, adrenalin seekers.
- Changes to family structures – intergenerational holidays, parent and toddler activities.
- Changing lifestyles – ‘back to basics’, outdoor lifestyles, nostalgia.
- Changing tastes – aspirations, celebrity influence, environmentally aware, digital downtime, healthier, new experiences, adventure, authenticity, volunteering.
- Changes to holiday patterns – increased demand for short breaks, medium breaks, holidays throughout the year.
- Increased concern over sustainability – welfare of host communities, damage to environments, exploitation and ethics.

D2 Motivating and enabling factors affecting the appeal of global destinations

- Motivating factors – wanderlust and sunlust (Gray 1970), relaxation, escape, socialisation with friends, rest, prestige, purpose of travel – health, education, sport, culture, adventure, business, VFR.
- Enabling factors:
 - having enough time and money, modern leisure paradox – money rich/time poor
 - availability of travel – ease of travel/accessibility, communication and transport links
 - availability of suitable product/holiday type
 - influence of destination marketing
 - consumer confidence.

E Factors affecting the popularity and appeal of destinations

Some global destinations with similar features may be more popular than others due to a number of factors. Some of these factors can be controlled by the destination itself while others are not within its control.

E1 Political factors

- Legislation, tourism policy, target markets and promotion, visa requirements, permits, compatible travel arrangements, destination management.
- Safety and security: stability, war, civil unrest, threat of terrorist attack.

E2 Economic climate

- Global recession, disposable incomes, exchange rates, currency fluctuations, cost of visiting.

E3 Accessibility and availability

- Infrastructure: gateways, travel and transport, new routes, electricity, water and waste management.
- Availability of tourism facilities, amenities and attractions, holidays.

E4 Image and promotion

- Publicity.
- TV, film, documentary, drama location and promotion.
- International events, conference, exhibitions, World Travel Market (WTM).

E5 Changing markets

- New and emerging markets.
- Emerging tourist-generating regions.

E6 Natural disasters

- Volcanic eruption.
- Earthquake.
- Tsunami.
- Landslide.
- Avalanche.

E7 Climate and its influence on travel

- Global climate zones – Mediterranean, equatorial, temperate, arid, polar, snow.
- Influence on travel – seasonal variations; potential disruptions – monsoons, risk of flooding, snow and ice, bush fires, storms, hurricanes, typhoons and tornadoes.

Grade descriptors

To achieve a grade learners are expected to demonstrate these attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

Level 3 Pass

Learners apply their knowledge of features of global destinations to explain their appeal and how they support different tourism activities. Learners will match travel arrangements to customer needs, with some relevant detail. Learners demonstrate knowledge and understanding of the factors and consumer trends that can contribute to the popularity of global destinations. Learners research and investigate current consumer trends and the factors that may influence the popularity and appeal of global destinations.

Level 3 Distinction

Learners provide detailed evaluations about the suitability of travel arrangements and itineraries in meeting customer needs. Learners can evaluate the factors and/or consumer trends that contribute to the popularity of global destinations. Learners can conduct valid and reliable research and synthesise knowledge of consumer trends and/or factors that may influence the popularity and appeal of global destinations.

Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Analyse	Learners present the outcome of methodical and detailed examination either by breaking down: <ul style="list-style-type: none"> • a theme, topic or situation in order to interpret and study the relationships between the parts and/or • information or data to interpret and study key trends and interrelationships.
Article	A piece of writing about a particular subject suitable for a magazine or newspaper
Email	A communication that gives information and is written using appropriate technology for a defined purpose in a task or activity.
Evaluate	Learners' work draws on varied information, themes or concepts to consider aspects such as: <ul style="list-style-type: none"> • strengths or weaknesses • advantages or disadvantages • alternative actions • relevance or significance. Learners' enquiries should lead to a supported judgement showing relationship to its context. This will often be in a conclusion.

Command or term	Definition
Explain	Learners provide detail and reasons and/or evidence to support an opinion, view or argument.
Illustrate	Learners include examples and diagrams to show what is meant within a specific context.
Justification	Learners give reasons or evidence to: <ul style="list-style-type: none"> • support an opinion and or decision • prove something right or reasonable.
Report	A formal document that is clearly structured and written in appropriate sector language.
Travel plan	A structured travel document giving a range of details and information with dates, times and places.

Links to other units

This unit links to:

- Unit 1: The World of Travel and Tourism
- Unit 3 Principles of Marketing in Travel and Tourism
- Unit 4: Managing the Customer Experience in Travel and Tourism
- Unit 9: Visitor Attractions.

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- visits to travel and tourism organisations operating in holiday destinations and transport hubs.

Unit 3: Principles of Marketing in Travel and Tourism

Level: **3**

Unit type: **Internal**

Guided learning hours: **90**

Unit in brief

Learners investigate the use of marketing in travel and tourism organisations and how to meet customer expectations in order to inform a promotional campaign of their own design.

Unit introduction

Marketing is an important focus for any successful organisation in travel and tourism where products, services and the expectations of customers are constantly changing. A successful business must have a strategy for understanding its customers and targeting them with a profitable offer.

In this unit, you will develop marketing skills through examining the specific aims and objectives of the marketing function and researching the needs and expectations of different customer types. You will develop your ability to communicate the findings of this research. You will use market intelligence to plan and produce a promotional campaign for a new travel and tourism product or service. You will learn about the importance of meeting customer expectations and communicating with customers effectively. You will investigate the different stages that an organisation or tourist destination goes through when marketing their products or services.

The assessment for this unit should be carried out after your learning in all the other units has been completed. This is because in completing your market research and promotional activities, you will select from learning across your qualification, for example, the scope of the travel and tourism industry, the types of travel and tourism organisations, their roles, the products and services they offer to customers, and features of tourist destinations.

This unit will help you progress to higher education to a variety of courses that require knowledge of marketing theory and research methods, and the development and review of marketing strategies, such as a degree in tourism, transport or leisure. The wide range of skills and knowledge you develop in this unit will also help to progress in your career.

Learning aims

In this unit you will:

- A** Explore the role of marketing activities in influencing customer decisions and meeting customer needs in travel and tourism
- B** Examine the impact that marketing activities have on the success of different travel and tourism organisations
- C** Carry out market research in order to identify a new travel and tourism product or service
- D** Produce a promotional campaign for a new travel and tourism product or service, to meet stated objectives.

Summary of unit

Learning aim	Key content areas	Recommended assessment approach
A Explore the role of marketing activities in influencing customer decisions and meeting customer needs in travel and tourism	<p>A1 Interrelationships between marketing and customer service in travel and tourism organisations</p> <p>A2 Influencing customer decisions and meeting needs</p> <p>A3 The marketing mix used by travel and tourism organisations</p> <p>A4 Potential impacts of the marketing mix and customer service</p>	A report or presentation evaluating the interrelationships of marketing and customer service activities to influence customer decisions and meet customer needs and the impact that marketing activities have on the success of two travel and tourism organisations.
B Examine the impact that marketing activities have on the success of different travel and tourism organisations	<p>B1 The role of marketing in different travel and tourism organisations</p> <p>B2 How marketing contributes to the success of travel and tourism organisations</p> <p>B3 Influences on marketing activity</p>	
C Carry out market research in order to identify a new travel and tourism product or service	<p>C1 Collecting market research data</p> <p>C2 Analysing market research data</p> <p>C3 Using research results to help identify a new product or service</p>	A promotional campaign for a new product or service for a travel and tourism organisation or destination, based on the application of market research data, including production of promotional material or activity.
D Produce a promotional campaign for a new travel and tourism product or service, to meet stated objectives.	<p>D1 Designing a promotional campaign to meet stated objectives</p> <p>D2 Producing promotional materials and activities</p>	This will be accompanied by an evaluation of the extent to which the campaign objectives can be achieved.

Content

Learning aim A: Explore role of marketing activities in influencing customer decisions and meeting customer needs in travel and tourism

Marketing activities and meeting customer needs work hand-in-hand to contribute to organisational success. Marketing has a key role to play in influencing customers to buy a travel and tourism product or use a service, leading to expectations that need to be met by excellent customer service.

A1 Interrelationships between marketing and customer service in travel and tourism organisations

Successful marketing and promotional activities will attract customers to a travel and tourism organisation. It is however effective customer service that is ultimately responsible for closing the sale and encouraging repeat business. It is therefore essential that the customer service provided by a travel and tourism organisation meets and exceeds customer expectations.

- Marketing principles and definitions of marketing.
- Marketing activities used to attract and retain customers, e.g.
 - identifying appropriate target markets for a travel and tourism product or service (market segmentation)
 - researching customer needs and preferences
 - establishing demand for a travel and tourism product or service.
 - promotional activities to influence key customer perceptions, e.g.
 - publicising positive first impressions of organisation
 - creating positive impression of image, reputation and trustworthiness
 - advertising products and services offered, such as perceived quality and value for money, consistency and reliability of product or services, organisational efficiency, speed and accuracy of service, how to contact the organisation, access information or advice and make a purchase
 - communication with customers to stimulate demand and to persuade them to buy the product or service
 - obtaining and interpreting feedback from customers:
 - use of social media and other types of media, trade articles, questionnaires, reviewing satisfaction levels, soliciting and acting on feedback, resolving and acting on complaints
 - identifying improvements as a result of customer communications and feedback, e.g. service-quality gaps, models of excellence.
- Goals of customer service are linked to marketing, e.g. uphold marketing messages.
- Interrelationships, e.g. marketing and customer service activities support each other to deliver superior customer service, exceed expectations, boost retention/repeat business/referral rates, resolve problems and complaints quickly.

A2 Influencing customer decisions and meeting needs

Different types of customers have different reasons for deciding whether to buy a product or use a service. Successful marketing takes into consideration the factors that influence purchasing decisions and ensures that activities and communications address customer needs.

- Different types of customer, e.g. families, individuals, groups, leisure, business, educational.
- Importance of identifying who has influence over purchasing decisions.
- Factors influencing customer decisions, e.g. the marketing mix; desire or need; confidence in the organisation; perceived and actual quality of product/service; reputation/image; effective marketing communications; value for money; customer service.

- Considering customer needs when carrying out marketing activities and communications, including
 - stated and unstated needs
 - customers with cultural and language needs
 - special needs, e.g. medical conditions, mobility
 - other needs, e.g. relating to age, gender, socio-economic group, family circumstances.
- Balancing customer satisfaction with organisational aims and objectives, including commercial objectives.

A3 The marketing mix used by travel and tourism organisations

The marketing mix is a set of actions used by travel and tourism organisations to promote a brand, product or service. Creating a marketing mix is instrumental to the achievement of organisational aims and objectives and the meeting of customer needs and expectations. A typical marketing mix is made up of the 4P's – Product, Price, Promotion and Place:

- Product, including:
 - product life cycles and product portfolios, e.g. unique selling point (USP), product range, differences in tastes and fashions between geographic areas and social groups over time
 - branding, e.g. creating brand awareness and positioning.
- Price, including:
 - pricing strategies, e.g. penetration pricing, dynamic pricing, economy pricing, premium pricing, promotional pricing, peak and off-peak pricing, competitor pricing
 - tactics, e.g. discounts, promotions, regional differences
 - potential advantages and disadvantages of pricing strategies and tactics in the long- and short term, factors to consider when setting prices, customer perceptions of value, pricing in global markets.
- Promotion, including:
 - promotional materials, activities and channels, e.g. advertising, digital, social media pop ups, sales promotion, direct marketing, digital marketing, sponsorship, displays, leaflets/brochures, public relations, press releases
 - selecting an appropriate promotional mix based on relevant factors such as target market, brand image
 - promotion in global, national, regional and local markets.
- Place, e.g. physical location, distribution channels, supply chains, marketing channels, online distribution, face-to-face selling.

A4 Potential impacts of the marketing mix and customer service

Offering an in-demand product that is set at the right price point, promoted through appropriate channels, conveniently placed and supported by effective customer service will positively impact both the customer and the organisation. Conversely, an uninspiring marketing mix in combination with poor customer service can have far-reaching negative impacts.

- Potential positive impacts, e.g. keeping customers satisfied, retaining existing customers, increasing customers' loyalty, ensuring repeat business, attracting new customers, driving partnerships with other providers, increasing customer spend, growing new products and services, enhancing an organisation's image, providing an edge over the competition, positive staff morale.
- Potential negative impacts, e.g. dissatisfied customers, complaints, lack of repeat business, loss of reputation, adverse publicity, poor staff morale, financial loss.

Learning aim B: Examine the impact that marketing activities have on the success of different travel and tourism organisations

B1 The role of marketing in different travel and tourism organisations

Marketing is a management process that is responsible for identifying, anticipating and satisfying customer requirements profitably. It has a key role to play in influencing customers to make a purchase or use a service.

- The marketing process in a travel and tourism context, including understanding the market, designing a marketing plan, planning marketing activities, building customer relationships and reviewing the success of marketing activity.
- Marketing aims and objectives, including market share, profitability, customer loyalty, the importance of setting SMART (Specific, Measureable, Achievable, Realistic, Time-bound) marketing objectives.
- Development of a brand and brand extensions in a travel and tourism context.
- Implications of organisation size for marketing activity, e.g. budgetary constraints, availability of specialist staff.
- Mass and niche market, including definitions, growth and decline, relationship to product life cycles in a travel and tourism context.

B2 How marketing contributes to the success of travel and tourism organisations

- Growth, e.g. using the Ansoff Matrix to help an organisation determine its product and market growth strategy (market penetration, product development, market expansion, diversification), acquisition.
- Links between marketing and achieving an organisation's aims and objectives.
- Different approaches to marketing activities, including
 - creating a marketing mix to meet customer needs and the organisation's aims and objectives.
 - push and pull approaches, customer relationship management (CRM), business to business (B2B), business to consumer (B2C).
- Potential impact on customers:
 - attracting new business, e.g. different target markets, either domestically or internationally or both, gaining customers from a competitor
 - retaining customers/repeat business, e.g. increasing current customer spend by encouraging more premium business or extra product purchase
 - building and retaining customer loyalty, e.g. collecting points on an incentive scheme, strengthening the organisation's brand
 - building on CRM techniques.
- Potential impact on the organisation:
 - developing clearer links between marketing and an organisation's aims and objectives, e.g. to develop a budget/premium brand, attract a different demographic
 - development of a brand and brand extensions, e.g. niche markets, relationship to product life cycles where a brand is rejuvenated after moving towards decline
 - increase in profits, e.g. leading to greater budget for marketing activities, larger dividends to shareholders.

B3 Influences on marketing activity

- External factors, e.g.
 - political, e.g. unrest, war, terrorism, international political relations
 - economic, e.g. recession, exchange rates, interest rates, customer disposable income
 - social, e.g. demographic and consumer trends, increase in older/younger consumers, decrease in number of children in families, new experiences, responsible travel, wellness
 - technological, e.g. social media, apps, transport development
 - legal and ethical considerations, e.g. current legislation such as consumer and data protection, advertising standards, sector codes of practice
 - environmental, e.g. extreme weather, natural disasters, focus on sustainable tourism.

- Internal factors, e.g.
 - size of the organisation
 - organisational aims and objectives
 - culture of the organisation, e.g. social responsibility
 - budget, e.g. business profits, marketing budget, changes to product pricing, investment in new marketing technologies
 - resources, e.g. technology, availability and expertise of specialist staff.
- Globalisation, including changes in the competitive environment, adaptation of marketing activity for different markets in travel and tourism.

Learning aim C: Carry out market research in order to identify a new travel and tourism product or service

Learners will carry out market research to identify a new product or service for a real travel and tourism organisation or destination, drawing on their wider understanding of the travel and tourism industry. Effective planning of market research activities ensures that the data collected is reliable and valid, and that the interpretation of the data will fully reflect the execution of promotional campaigns in travel and tourism organisations.

C1 Collecting market research data

- Preparing for market research activity, e.g. identifying the organisation's aims and objectives, setting market research objectives, choosing primary and secondary research methods in relation to objectives, target group on which to focus research.
- Appropriate sources of primary research, e.g. survey, interview, observation, trials, questionnaires, focus groups.
- Appropriate sources of secondary research, e.g. published reports, industry reports, back data on previous tourists or travellers, social media feedback, government data on population statistics, consumer trends, researching competitors.
- Importance of validity, reliability and currency.
- Quantitative and qualitative data, methods of collection, purpose of collection.

C2 Analysing market research data

- Using primary and secondary research data to determine if there is a demand for the new product or service.
- Using primary and secondary research data to determine the target market, including understanding customer needs, matching needs to products and services.
- Competitor analysis, e.g. identifying strong or weak competitors, determining close and distant competitors, identifying their marketing strategies.
- Data, including
 - quantitative, e.g. finance figures, customer numbers
 - qualitative, e.g. questionnaire responses, focus group responses.

C3 Using research results to help identify a new product or service

- Use of research data to determine and justify target market and demand for the product/service.
- Use of research data to help establish the essential purpose and features of the product or service.
- Use of research data to inform campaign aims and objectives and suitable communication methods
- Use of research data to inform the marketing mix (the 4Ps), determine features of the new product/service and characteristics of the target market.

Learning aim D: Produce a promotional campaign for a new travel and tourism product or service, to meet stated objectives.

Learners will draw on their wider understanding of the travel and tourism industry to design a promotional campaign for a new travel and tourism product or service for a real travel and tourism organisation or destination, producing promotional material or activity to meet stated objectives.

D1 Designing a promotional campaign to meet stated objectives

Key factors to consider in the design of a successful campaign.

- Campaign aims and objectives, e.g. to introduce a new product or service, to increase profit for the organisation, to gain more customers through short term discounts, to draw customers to a specific event aimed at a specific market.
- How the promotional campaign contributes to organisational objectives, reinforces and supports brand values and adds to sustainability of marketing activities.
- Identification of target market.
- Product or service information, including Unique Selling Points (USPs.)
- Price of product or service, including strategies, tactics.
- Place, including how and where the product or service can be purchased.
- Promotion, including timescale of campaign with rationale for decision, e.g. a week, a month, season for campaign to run, e.g. during peak or off peak times, types of promotional activities and materials to be used and planned distribution methods.
- Campaign budget.
- The Key performance indicators (KPIs) that could be used to judge the success of the promotional campaign, e.g. sales revenue, profit, customer retention and new customers gained.

D2 Producing promotional materials and activities

In order to be effective, promotional materials and activities should be professionally presented, clearly aimed at the target market, meet the marketing aims and objectives, and include all necessary information.

- Promotional materials and activities, e.g.
 - leaflets, brochures, door hangers, flyers, posters, banners, direct mail/email, endorsements on portable items and clothing, presentations, blogs, vlogs, advertisements such as TV/ radio/ magazine/online, demonstrations, public speaking, presence at trade fairs
 - landing page (a page on a website dedicated to a specific promotion) and Call-To-Action (CTA) asking potential customers to become involved in a campaign, e.g. a social media request to share a photo featuring a product and a specified #hashtag, resulting in a reward.
- Factors for consideration, including key objectives of the material and activities, most appropriate promotional activities/materials to be used, target audience, appropriate methods or platforms for material and communication distribution, information to be communicated (e.g. product/service detail, price, where to buy, dates of event), headlines; images; typography.
- Use of AIDA (Attention, Interest, Desire, Action) for checking that promotional material will attract customers and encourage purchase of the product or use of the service.
- Keep It Short and Simple (KISS) strategy.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore the role of marketing activities in influencing customer decisions and meeting customer needs in travel and tourism		
<p>A.P1 Explain how effective marketing and customer service in travel and tourism organisations work together to influence customer decisions and meet customer needs.</p> <p>A.P2 Explain the potential impacts of the marketing mix on travel and tourism organisations and customers.</p>	<p>A.M1 Analyse the potential impacts of the marketing mix and the ways in which effective marketing and customer service work together to influence customer decisions and meet customer needs.</p>	<p>A.D1 Evaluate the potential impacts of the marketing mix and the ways in which effective marketing and customer service work together to influence customer decisions and meet customer needs.</p>
Learning aim B: Examine the impact that marketing activities have on the success of different travel and tourism organisations		
<p>B.P3 Explain how marketing activity is conducted differently by two travel and tourism organisations to achieve organisational objectives, taking into account internal and external factors.</p> <p>B.P4 Explain how marketing activities contribute to the growth and customer relationships of two travel and tourism organisations.</p>	<p>B.M2 Analyse the different approaches to marketing activities used by two travel and tourism organisations to achieve organisational objectives, taking into account internal and external factors.</p>	<p>B.D2 Evaluate the potential impacts of the different approaches to marketing activities used by two travel and tourism organisations to achieving success, taking into account internal and external factors and justifying recommendations for improvement.</p>
Learning aim C: Carry out market research in order to identify a new travel and tourism product or service		
<p>C.P5 Identify a new travel and tourism product or service through the use of data obtained from primary and secondary market research.</p>	<p>C.M3 Identify a new travel and tourism product or service through the analysis of data obtained from primary and secondary market research.</p>	<p>C.D3 Identify a new travel and tourism product or service, justifying the data obtained from primary and secondary market research.</p>
Learning aim D: Produce a promotional campaign for a new travel and tourism product or service, to meet stated objectives		
<p>D.P6 Produce a promotional campaign for a new travel and tourism product or service, including promotional material or activity, explaining how campaign objectives can be achieved.</p>	<p>D.M4 Produce a detailed promotional campaign for a new travel and tourism product or service, including promotional material or activity, analysing how campaign objectives can be achieved.</p>	<p>D.D4 Produce a comprehensive promotional campaign for a new travel and tourism product or service, including promotional material or activity, evaluating the extent to which campaign objectives can be achieved.</p>

Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, B.P4, A.M1, B.M2, A.D1, B.D2)

Learning aims: C and D (C.P5, D.P6, C.M3, D.M4, C.D3, D.D4)

Further information for teachers and assessors

Resource requirements

For this unit, learners must have access to a range of current travel and tourism business information from websites and other relevant sources. Employer links are essential sources of information and of data pertinent to successful assessment completion; these links can be developed through activities such as educational visits and the use of guest speakers.

Essential information for assessment decisions

Learning aims A and B

Learners should build on and make connections between their evidence for learning aims A and B and the assessment tasks from across their programme of learning that relate to knowledge and understanding of types of travel and tourism, and types of travel and tourism organisations. They will use examples from two travel and tourism organisations to show their understanding of different approaches to marketing.

To achieve learning aim B, learners must select organisations that have contrasting approaches to marketing. Teachers should ensure that the marketing approach used by each of the selected travel and tourism organisations provides sufficient scope for learners to fully complete the assessments.

For distinction standard, learners will make consistently accurate judgements about the significance of different impacts of the marketing mix and the ways in which effective marketing and customer service work together. They will show accurate understanding of both specific and wider impacts and make logical, contextualised links between marketing and customer service in travel and tourism. Learners will offer convincing reasons and examples that justify their evaluation and give clear conclusions.

Learners will evaluate the potential impacts of the different approaches to marketing activities used by two travel and tourism organisations, drawing accurately on varied information. They will consider the relevance of the internal and external factors and different approaches used to achieve organisational success. Learners will include well-selected, relevant examples that fully support justified recommendations for improvement. They may use examples of marketing activities carried out by other organisations to support their recommendations. The evidence will demonstrate high-quality written or oral communication through the use of accurate terminology and vocabulary to support a well-structured and considered response.

For merit standard, learners will consider different aspects of the potential impacts of the marketing mix. They will also investigate the relationship between effective marketing and customer service in influencing customer decisions and meeting customer needs. Learners will refer to industry examples to support the outcomes of their detailed examination.

Learners will analyse individual aspects of the different approaches to marketing activities used by two travel and tourism organisations, to achieve organisational objectives. Learners' analysis will show clear consideration of internal and external factors. The evidence will make use of appropriate terminology and demonstrate good-quality written or oral communication.

For pass standard, learners will show realistic understanding of how marketing and customer service work together to influence customer decisions and meet customer needs. Learner evidence will include some relevant examples of how marketing and customer service activities interrelate to influence a customer's decision to make a purchase and to ensure that customer needs are met.

Generally appropriate references will be made to the marketing mix in terms of its potential impacts on organisations and customers. Learners will refer to the potential impacts of both effective and ineffective marketing mix strategies. Each of the 4Ps (*Product, Price, Promotion and Place*) will be explored, with some relevant detail and reasoning provided. Examples from real travel and tourism organisations should be used to support explanations.

Learners will give generally correct details regarding how marketing activity is conducted differently by two travel and tourism organisations in order to achieve organisational objectives. Learners will take some relevant internal and external factors into account and show understanding of how marketing activities contribute to the growth and customer relationships of these organisations. The evidence will show details and reasons to support the explanation or view expressed.

Learning aims C and D

In completing the assessment activity for learning aims C and D, learners will consider and select content that will enable them to apply their knowledge and skills from across the other units in an integrated way. Learners will, for example, use appropriate forms of primary and secondary market research, such as surveys and industry reports, to show justification for the planned promotional activity for the proposed new product or service.

Through the use of market research, learners should identify a new travel and tourism product or service for which they will produce a promotional campaign. This may be for a new product or service for a real travel and tourism organisation or for a tourist destination. Learners will draw on their wider understanding of the travel and tourism industry and consumer trends and/or factors that may influence the appeal of the new product or service for a travel and tourism organisation or tourist destination.

For distinction standard, learners will provide a detailed justification of data obtained through primary and secondary market research, which they have used to identify a valuable new travel and tourism product or service.

A comprehensive and convincing promotional campaign for a new travel and tourism product or service will be created, supplemented by the production of at least one highly effective piece of promotional material or a promotional activity, produced to industry standard.

Learners will also provide a convincing evaluation of the extent to which campaign objectives can be achieved through the implementation of effective marketing. The evaluation will lead to a supported judgement showing logical, contextualised links between relevant aspects of the promotional campaign and intended objectives.

For merit standard, learners will provide a clear and detailed analysis of data obtained through primary and secondary market research sources to identify a suitable new product or service for a real travel and tourism organisation or destination.

The promotional campaign for the new product or service will be appropriate, well considered and detailed, supplemented by the production of at least one piece of high-quality promotional material or a promotional activity.

Learners will provide a well-reasoned analysis of how campaign objectives can be achieved as a direct result of effective marketing. The analysis will show generally accurate consideration of the relationship between the proposed campaign and intended objectives.

For pass standard, learners will select a real travel and tourism organisation or destination and carry out primary and secondary market research, interpreting data and information, to identify a new travel and tourism product or service to add to an existing portfolio.

Learners will use the data and information obtained through their research to inform a competent, generally realistic promotional campaign for their chosen new product or service.

The explanation of how campaign aims and objectives can be achieved through effective marketing will include some relevant detail for the explanation or view expressed. For example, where 'increased profit' has been identified as a campaign objective, the learner may explain how the new product will be promoted with a view to increasing sales and therefore positively impacting overall company profit as a result.

The promotional campaign will include identification of all planned promotional materials and activities. Learners will then produce at least one realistic item of promotional material or a promotional activity to advertise or promote the new product or service. Learners will communicate competently, using appropriate English and correct use of technical/vocational language.

Links to other units

This unit links to all other units in the specification.

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- designs and ideas to contribute to unit assignment, case study and/or project materials
- work experience
- exemplar materials
- support from local organisation staff as mentors.

Unit 9: Visitor Attractions

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners develop analytical skills as they investigate the nature and role of both built and natural visitor attractions, their commercial success, appeal, response to diverse visitor needs and the importance of delivering a memorable visitor experience.

Unit introduction

Visitor attractions can draw both domestic and overseas visitors by providing opportunities for relaxation, amusement and education. They are a major source of revenue for the travel and tourism industry as well as for the UK and the global economy.

In this unit, you will investigate visitor attractions and the different ways they are funded. You will explore what is meant by the visitor experience and how visitor attractions develop, diversify and use technology in order to meet the needs of their different types of visitors.

By developing your knowledge and skills in researching and evaluating the effectiveness of visitor attractions, the unit will help you progress to higher-education courses such as degrees in tourism, leisure or business studies. The wide range of skills and knowledge developed in this unit will also help your career progression.

Learning aims

In this unit you will:

- A** Investigate the nature, role and appeal of visitor attractions
- B** Examine how visitor attractions meet the diverse expectations of visitors
- C** Explore how visitor attractions respond to competition and measure their success and appeal.

Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<p>A Investigate the nature, role and appeal of visitor attractions</p>	<p>A1 Types of visitor attractions A2 Scale, scope and appeal of visitor attractions A3 Ways in which visitor attractions are funded A4 Importance of additional revenue generation strategies for visitor attractions</p>	<p>A presentation, with speaker notes, that examines the different types of visitor attractions, showing why they appeal to visitors, how these attractions are funded and evaluates the importance of visitor attractions to the local and national economy.</p>
<p>B Examine how visitor attractions meet the diverse expectations of visitors</p>	<p>B1 Different types of visitors and their diverse expectations B2 Products and services provided, including primary and secondary spend opportunities B3 Ways to meet and exceed visitor expectations B4 Use of technology and its importance for visitor attractions</p>	<p>An article that explores how two contrasting visitor attractions offer products and services and use technology to meet and exceed visitor expectations.</p>
<p>C Explore how visitor attractions respond to competition and measure their success and appeal</p>	<p>C1 Strategies for responding to competition C2 Success and appeal, using data analysis to measure visitor trends and visitor numbers</p>	<p>A report that explores how two different types of visitor attraction respond to competition and the importance of effectively measuring their success and appeal.</p>

Content

Learning aim A: Investigate the nature, role and appeal of visitor attractions

A1 Types of visitor attractions

- Built attractions: theme parks, museums, galleries, heritage sites, national monuments, cultural heritage, arts, sporting venues, visitor centres.
- Natural attractions: National Parks, Areas of Outstanding Natural Beauty (AONB), coastlines, forests, rivers, canals, lakes, countryside parks, gardens, beauty spots.
- Events, e.g. festivals that attract tourists, sporting events that attract tourists, Meetings, Incentives, Conferences and Events (MICE).

A2 Scale, scope and appeal of visitor attractions

- Scale:
 - international, national, regional, local attractions, e.g. Disney® World's Magic Kingdom, Taj Mahal, Stonehenge, Robben Island, ZSL Whipsnade Zoo, RHS Garden Wisley, the Library of Birmingham, Pleasure Beach Blackpool
 - ownership: public, private, voluntary/not for profit
 - size and complexity of attractions
 - contribution to the local and national economy: tertiary, quaternary, primary and secondary, reflected in the multiplier effect.
- Scope:
 - development, e.g. new rides, visitor centres, other amenities
 - diversification, e.g. exhibitions, special events, conservation
 - regeneration areas, e.g. Albert Docks Liverpool, Cardiff Bay, Bilbao City Centre and Museums, World Trade Center New York.
- Appeal:
 - accessibility of locations, including opening times, transport links, pricing strategy, special offers, indoor and outdoor facilities
 - special events
 - popularity, including trends, image and reputation, repeat business.

A3 Ways in which visitor attractions are funded

- Funding from external organisations:
 - Department for Media, Culture and Sport (DCMS), VisitBritain, National Lottery, EU Funding
 - Growth Programme: grants for the rural economy
 - trusts, e.g. The National Trust, Heritage Lottery Fund, English Heritage, Cadw, UNESCO, Global Heritage Fund.
- Self-funded organisations:
 - charitable trusts, educational charities, e.g. Dynamic Earth, Winchester Science Centre and Planetarium
 - attractions funded only through income from visitors, e.g. Tropical Wings Zoo.

A4 Importance of additional revenue generation strategies for visitor attractions

- Additional or new sources of income, e.g. novelty events and exhibitions, offering or expanding on-site accommodation, new merchandising initiatives, venue hire initiatives.
- Importance of additional revenue generation strategies, e.g. provide additional revenue stream to increase profits or allow expansion.

Learning aim B: Examine how visitor attractions meet the diverse expectations of visitors

B1 Different types of visitors and their diverse expectations

- Different types of visitors – UK based and overseas:
 - individuals – adults, children
 - families
 - groups – education
 - overseas visitors
 - UK tourists visiting attractions overseas
 - people with specific needs.
- Diverse visitor expectations, to include:
 - accessibility
 - cost and convenience
 - safety and security
 - entertainment
 - education/information – provision of a learning environment.

B2 Products and services provided, including primary and secondary spend opportunities

- Products and services provided, e.g. rides, exhibits, landscapes, information centres, maps.
- Support services, e.g. visitor information centre, parking, park and ride facilities, transfer shuttles, toilets and restrooms, first aid, crèche and children's facilities, signage, security, cleaning.
- Primary spend opportunities, e.g. admission, seats, exhibition tickets.
- Secondary spend opportunities, e.g. shops or retail outlets, merchandising, catering and accommodation, guided tours, visitor centres, events, ticket upgrades to avoid queues, day ticket upgrade to annual pass, pass for multiple entry to a range of attractions.

B3 Ways to meet and exceed visitor expectations

- Appeal of location and environment.
- Accessibility and quality of existing products and services.
- Development of new products/services, e.g. new rides at theme parks, special events and exhibitions at museums, galleries or heritage sites, enhanced provision for visitors who have sensory impairment.
- Diversification of facilities and amenities, e.g. conservation, retail, conference, catering and accommodation opportunities.
- Image, branding and promotional offers, e.g. free Wi-Fi access, group discounts, advance purchase discounts, discounts via other organisations such as tourist boards, travel agencies or transport providers.

B4 Use of technology and its importance for visitor attractions

- Booking systems, e.g. internet facilities/mobile applications, reservation systems, ticket collection points.
- Visitor management systems, e.g. electronic information boards/signage, controlled gates, managed visitor flows, staff communication – mobile phones/pagers/two-way radio.
- Technological features secondary to the attraction, for example:
 - interactive displays/virtual reality tours/ audio tours
 - guiding and guiding methods – tourist guides (White, Green, Blue Badge), personal interpretation, video screenings, enactment, guidebooks and brochures
 - free apps for mobile devices
 - special effects, animation and simulation, e.g. Jorvik Viking Centre York, Universal Studios Hollywood, Uluru-Kata Tjuta National Park.
- The importance of technology for visitor attractions, to include:
 - improving the quality of products and services offered, e.g. 3D digital models/exhibitions, simulated rides, high-tech events

- improving ease of access/booking or reduction in queuing times, e.g. electronic fast-track passes, online booking/reservation systems
- reducing operating costs, e.g. in staffing, training, maintenance
- enhancing the image or raising the profile of the visitor attraction, e.g. high standards of website accessibility and availability, virtual tours
- helping to maintain a competitive edge by enhancing overall visitor experience.

Learning aim C: Explore how visitor attractions respond to competition and measure their success and appeal

C1 Strategies for responding to competition

- Reliable market research:
 - understanding visitors and their needs through feedback from appropriate sources, e.g. customer feedback and review sites, commissioned surveys
 - analysis of visitor types, numbers, seasonality, repeat business.
- Planning and marketing:
 - effective planning of the development of the attraction, including appropriate diversification and marketing strategies
 - personalised target marketing.
- Providing high-quality visitor experiences:
 - offering products and services that lead to a memorable visitor experience.
- Building brand loyalty:
 - maintaining profile or raising awareness of the attraction
 - special/regular events, e.g. Scarefest at Alton Towers, Port Aventura's White Nights, Macy's Thanksgiving Parade, New York
 - effective management of seasonality and product development.

C2 Success and appeal, using data analysis to measure visitor trends and visitor numbers

Indicators of success and appeal, to include:

- numbers of visitors:
 - types of visitors, e.g. overseas, domestic visitors, cultural exchanges
 - length of stay
 - average spend per visitor type
 - repeat visitors
- data compiled by visitor associations:
 - Association of Leading Visitor Attractions (ALVA)
 - British Association of Leisure Parks, Piers and Attractions (BALPPA)
- other indicators of success and appeal, e.g.:
 - increased employment – seasonal/all year round
 - increased investment/development/infrastructure
 - regeneration of areas, improved local services and facilities
- methods used to present and analyse data in order to measure success and appeal, e.g.:
 - spreadsheets/graphs/pie charts showing visitor numbers, trends, spend
 - surveys, questionnaires
 - break-even analysis
 - monitoring through electronic turnstiles
 - annual reports.
- importance of measuring and analysing success and appeal of visitor attractions, e.g.:
 - launch of marketing campaigns, sponsorship
 - regeneration
 - investment and development of new products and services
 - maintaining image and reputation.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Investigate the nature, role and appeal of visitor attractions		
<p>A.P1 Examine the appeal of two different visitor attractions and how they are funded.</p> <p>A.P2 Explain the scale and scope of two different visitor attractions and their contribution to the local and national economy.</p>	<p>A.M1 Analyse the appeal of two different visitor attractions, how they are funded and the importance the visitor attractions have for the local and national economy.</p>	<p>A.D1 Evaluate the appeal of two different visitor attractions, the way they are funded and their contribution to the local and national economy.</p>
Learning aim B: Examine how visitor attractions meet the diverse expectations of visitors		
<p>B.P3 Explain how two different visitor attractions offer products and services that meet the diverse expectations of its visitors.</p> <p>B.P4 Explain the importance of technology for two different visitor attractions.</p>	<p>B.M2 Analyse the importance of products and services offered by two different visitor attractions and the use of technology in meeting the diverse expectations of its visitors.</p>	<p>B.D2 Evaluate the suitability of products and services provided by two different visitor attractions and the use of technology in meeting the diverse expectations of its visitors.</p>
Learning aim C: Explore how visitor attractions respond to competition and measure their success and appeal		
<p>C.P5 Explain how two different visitor attractions respond to competition.</p> <p>C.P6 For the two selected visitor attractions, explain the importance of measuring success and appeal and the role of data analysis.</p>	<p>C.M3 For two selected visitor attractions, analyse the importance of responding to competition and measuring the attraction's appeal, including the role of data analysis.</p>	<p>C.D3 For two selected visitor attractions, evaluate the effectiveness of the way in which each attraction responds to competition and measures their success and appeal using data analysis.</p>

Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6* gives information on setting assignments and there is further information on our website.

There is a maximum number of three summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aim: B (B.P3, B.P4, B.M2, B.D2)

Learning aim: C (C.P5, C.P6, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

For this unit, learners must have access to a range of information about visitor attractions, from primary sources such as visits and speakers to secondary sources such as websites and printed resources.

Essential information for assessment decisions

Learning aim A

In order to achieve the assessment criteria for this learning aim, learners will select and research **two** specific visitor attractions. The two visitor attractions can be drawn from any of the categories: built, natural and events. If two attractions are selected from the same category they should be sufficiently contrasting, for example a theme park and a museum. Teachers should ensure that the two examples selected by learners provide sufficient scope to enable them to fully complete the assessments.

For distinction standard, learners will thoroughly evaluate the appeal of two sufficiently contrasting examples of visitor attractions, the way they are funded and the contribution these visitor attractions make to the local and national economy. Learners will show an in-depth understanding of the scale and scope of the two contrasting visitor attractions. They will use appropriate evidence in order to support conclusions drawn from their research. This could include statistical data, where available. Learners will give specific, well-selected details relating to the importance of the visitor attractions to the local and national economy and provide justified reasons for their conclusions in each case. The evaluation will be sustained and clearly focused on the relative significance of different factors and interdependencies between them. The evidence will demonstrate high-quality written/oral communication through the use of accurate and fluent vocabulary to support a well-structured and considered response.

For merit standard, learners will give a clear, balanced analysis of the appeal of two sufficiently contrasting examples of visitor attractions, how they are funded and the importance these two visitor attractions have for the local and national economy. It will be evident from the analysis that the scale, scope and appeal have been clearly investigated and understood by learners. They will give relevant details of the appeal, funding and contribution of each visitor attraction. The details will be valid and clearly linked to their analysis. Generally relevant evidence will be used to support the analysis. This could include statistical data, where available. The evidence will demonstrate good-quality written/oral communication.

For pass standard, learners will give an appropriate explanation of two sufficiently contrasting examples of visitor attractions, their appeal and how they are funded. Appropriate and realistic details of the scale, scope and appeal of the different visitor attractions and their contribution to the local and national economy will also be included in the explanation. The evidence may be detailed but unbalanced in parts, or supported by superficial use of examples or reasons.

Learning aim B

For distinction standard, learners will give a thorough, convincing evaluation of how two different visitor attractions provide products and services for their different types of customers in order to meet and exceed customer expectations. The evaluation will identify the 'typical' visitor, their requirements and opportunity for primary and secondary spend. Learners will evaluate how important technology is for two different visitor attractions selected, how technology is used and how it benefits the attraction and their customer. Robust conclusions and recommendations will be drawn for both attractions selected. The evaluation will be sustained and clearly focused on the suitability of different factors and interdependencies between them. Learners will demonstrate high-quality written communication skills.

For merit standard, learners will produce a clear, balanced analysis of different kinds of products and services provided by two different visitor attractions and the technology used to effectively meet the needs of their customers. Both potentially positive and negative aspects of products, services and the use of technology will be considered. References to potential impacts will be specific and relevant. Learners will give an accurate analysis that is methodical and demonstrates good-quality written communication skills.

For pass standard, learners will explain the products and services offered by two different visitor attractions as part of the visitor experience. Learners will explain how technology is used to enhance the visitor experience, showing an appropriate but, in parts, superficial understanding of how technology has been used by visitor attractions to achieve these goals. The range of examples of products, services and technology given by learners might be limited in scope or depth. Their investigation will be realistic and appropriate, however the evidence may contain some inaccuracies. The explanations will contain limited detail and foresight.

Learning aim C

For distinction standard, learners will produce, for two contrasting visitor attractions, a detailed examination of the importance of responding to competition and measuring success and appeal. They will give a comprehensive, convincing evaluation of how successfully two different visitor attractions respond to competition and measure their success and appeal. Learners will make consistently valid and insightful references to the importance of data analysis in measuring the success and appeal of the two visitor attractions. Specific, detailed references will be made to strategies used to respond to competition and the reasons for their success or lack of success. Any references to examples of supporting data will be consistently accurate. The evaluation will be sustained and clearly focused on the relative effectiveness of different factors and interdependencies between them. Learners will articulate their arguments and views concisely and fluently, evaluating concepts, ideas and actions in order to reach valid and justified conclusions.

For merit standard, learners will methodically analyse, for two contrasting visitor attractions the importance of responding to competition and measuring their success and appeal. Learners may make generally accurate references to relevant data to support their analysis. Learners will appreciate the relative significance of different factors involved in responding to competition and measuring success, and the relationship between these factors. Learners will make clear, relevant references to the importance of data analysis in measuring the success and appeal of visitor attractions. They will give a clear, accurate and balanced analysis that demonstrates good-quality written or oral communication. The evidence will use appropriate and accurate terminology.

For pass standard, learners will give a basic explanation of how two selected, contrasting visitor attractions respond to competitors. They will also explain why it is important that these visitor attractions measure their success and appeal and why the visitor attractions might use data analysis in measuring their success and appeal. Learners may make some competent references to data to support their explanations, although some of the supporting data might not be relevant. Learners' explanations will be realistic and appropriate, however the evidence may contain some inaccuracies, be limited in parts or be supported by limited use of valid examples.

Links to other units

This unit links to:

- Unit 1: The World of Travel and Tourism
- Unit 2: Global Destinations
- Unit 4: Managing the Customer Experience in Travel and Tourism
- Unit 11: Events, Conferences and Exhibitions.

Employer involvement

This unit would benefit from employer involvement in the form of:

- work experience/work shadowing
- visits to relevant visitor attractions
- talks by specialist speakers.

Unit 11: Events, Conferences and Exhibitions

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners will develop knowledge and skills in resource and financial planning as they gain an insight into a wide range of events, conferences and exhibitions that are relevant to the travel and tourism industry.

Unit introduction

The management and coordination of events, conferences and exhibitions is a dynamic and exciting area that is relevant to a number of sectors. This unit will help you develop your creative, financial and organisational skills.

You will explore the diversity and scale of events, conferences and exhibitions that the travel and tourism industry is involved with. You will consider the complexity of developing large-scale and small-scale events, which may be local, national or international. You will gain an insight into the processes involved in running an event or conference and consider legal aspects, logistics and subcontracting.

By developing your research, problem-solving, financial and communication skills, this unit will help you progress to higher education courses. The wide range of skills and knowledge developed in this unit will also help your career progression.

Learning aims

In this unit you will:

- A** Explore the range, scale and potential impact of events, conferences and exhibitions in the travel and tourism industry
- B** Investigate the planning skills, methods and processes required before, during and after an event, conference and exhibition
- C** Develop and review a proposal for a local, national or international event, conference or exhibition to meet client requirements.

Summary of unit

Learning aim	Key content areas	Recommended assessment approach
A Explore the range, scale and potential impact of events, conferences and exhibitions in the travel and tourism industry	<p>A1 Events, conferences and exhibitions</p> <p>A2 Factors affecting the success of an event, conference or exhibition</p> <p>A3 Changing trends in events, conferences and exhibitions</p> <p>A4 The potential impact of events, conferences and exhibitions on the host area</p>	A report that investigates the range of events, conferences and exhibitions that individuals working in the travel and tourism industry are involved with, current trends and the factors that help make an event successful and their wider potential impact on host areas.
B Investigate the planning skills, methods and processes required before, during and after an event, conference and exhibition	<p>B1 Preparing for a local, national or international event, conference and exhibition</p> <p>B2 Supporting the delegates</p> <p>B3 Tasks to be carried out after the event, conference and exhibition</p> <p>B4 Subcontracting</p>	A slideshow presentation with speaker notes that detail the stages (pre, during and post), skills, methods and processes required to plan and manage an event, conference and exhibition on a local, national or international scale.
C Develop and review a proposal for a local, national or international event, conference or exhibition to meet client requirements	<p>C1 Proposal for an event, conference or exhibition</p> <p>C2 Event planning and delegate management tools</p> <p>C3 Meeting client requirements</p> <p>C4 Efficient financial costings</p> <p>C5 Obtaining feedback</p> <p>C6 Reviewing the proposal, including financial costings</p>	A detailed proposal and financial costing for a local, national or international event, conference or exhibition to meet client requirements, together with recommendations for potential improvements.

Content

Learning aim A: Explore the range, scale and potential impact of events, conferences and exhibitions in the travel and tourism industry

Many events, conferences and exhibitions require varying degrees of involvement from the travel and tourism industry, dependent on the scope, scale and location of the event, conference or exhibition being planned.

A1 Events, conferences and exhibitions

- Events:
 - business events, e.g. annual general meeting (AGM)/extraordinary general meeting (EGM) of shareholders, awards evenings, balls, formal dinners, team building
 - global and national sporting events, e.g. the Olympic Games, Paralympic Games, Winter Olympic Games, the Commonwealth Games, Rugby World Cup, Formula 1®, Great North Run, international football matches, e.g. FIFA World Cup™, domestic football matches, e.g. Premier League, horse racing, e.g. Grand National
 - large-scale recreation events, e.g. flower shows, regional food fairs, switching on Christmas lights
 - local interest, e.g. country fairs, fun runs, village fetes, collectors' fairs
 - entertainment, e.g. music festivals, concerts, plays, Mardi Gras, LGBT Pride events
 - celebrations, e.g. weddings, prom nights, birthdays, religious festivals, royal events
 - social enterprise events, e.g. charity fundraising dinners, sporting events, auctions.
- Conferences:
 - diverse nature – different sizes and aims, e.g. one-day events, overnight conferences, domestic and overseas, seminars, staff training sessions, internal company conferences, industry-wide conferences, trade fairs, political conferences, keynote sessions, breakout sessions
 - promoting products, e.g. product launches, trade shows, press conferences, linked publicity stunts, touring campaigns.
- Exhibitions:
 - national arena exhibitions – central location, good transport links, customer facilities, large sphere of influence, e.g. Ideal Home Show, The London Classic Car Show, The Clothes Show.

A2 Factors affecting the success of an event, conference or exhibition

- Internal factors, e.g. date changes, clashing events, availability of speakers, resources, venues, infrastructure and logistics, staff illness, company budget, staff morale levels, quality of organisation.
- External factors, e.g. industrial action, changes in availability or cost of transport and accommodation, extreme weather, terrorism, natural disasters.

A3 Changing trends in events, conferences and exhibitions

- Venue, e.g. growth of unusual venues, popularity of budget venues, demand for better facilities, virtual tours.
- Organisation, e.g. growth of event management companies, web-conferencing, e-meeting, specialist and themed events such as Comic Con, Glastonbury Festival.
- Transport, e.g. significance of transport costs, reducing carbon footprint, business corporate and social responsibility agenda.
- Security requirements, e.g. gaining access to venues, types of checks required.

A4 The potential impact of events, conferences and exhibitions on the host area

A variety of potential impacts on the host area may arise from events, conferences and exhibitions, to include:

- multiplier effect in local and national economy
- potential impact on local and national environment and quality of life
- potential impact on local and national infrastructure
- potential impact of publicity surrounding the event.

Learning aim B: Investigate the planning skills, methods and processes required before, during and after an event, conference and exhibition

A successful event, conference or exhibition is one that has been well planned, draws on skills and expertise and makes use of appropriate methods and processes to design and coordinate the event.

B1 Preparing for a local, national or international event, conference and exhibition

- Purpose of the event, conference and exhibition:
 - aims and objectives, size of audience, target audience, level of formality.
- Resource considerations:
 - suitable venue choice, e.g. location, size, layout, availability, access, parking, capacity, cancellation policy, overnight accommodation (in venue or nearby), transport links
 - equipment and venue layout, e.g. AV equipment, Wi-Fi provision, delegate packs, seating arrangements, hospitality, entertainment, support services, staffing
 - entertainment requirements included in the event, conference and exhibition, e.g. guest speakers, bands, magicians, comedians
 - entertainment requirements outside of the event, conference and exhibition, e.g. providing information on nearby visitor attractions, day/evening trips, recommended bars/clubs/casinos near the venue.
- Financial and contracting considerations:
 - budget, expenditure and major costs, e.g. venue hire, ancillary/support service, catering, speaker fees
 - legal, e.g. data protection, consumer protection, cancellation and refund policy, health and safety requirements, negligence liability, terms and conditions
 - early-bird discounts and daily delegate rate
 - subcontracting, e.g. catering, equipment, furniture
 - health and safety, e.g. first aid, lost children.
- Logistical considerations:
 - marketing and communication, e.g. marketing the event, conference and exhibition, identifying the target market, distributing supporting documents/files, highlighting ways of joining, incentives for large bookings, providing updates to schedule
 - contingency, e.g. preventing and managing unforeseen issues, risk assessment, security, contingency planning, effective communication
 - maximum capacity, delegate management system (DMS), registration
 - transport, connections, hubs and schedules.

B2 Supporting the delegates

- Advising delegates in the event of unforeseen issues, e.g. adverse weather conditions, industrial action by transport providers, cancellation of some aspects of the event, conference and exhibition.
- Advising delegates regarding transport and travel options to and from the venue, e.g. providing information about public transport, arranging group transport, e.g. minibus, coach, trip extensions visiting nearby destination, booking accommodation, flight connections, transfers.

- Advising delegates regarding options for activities and local attractions near the venue, e.g. providing information on activities and attractions, booking tickets, arranging transport.
- The importance of contemporary delegate management systems.

B3 Tasks to be carried out after the event, conference and exhibition

- Evaluation, e.g. debrief, delegate questionnaires, online feedback, analysis of profit, identifying problems and solutions, review of aims and objectives, recommendations for improvement.
- Other tasks to be carried out after the event, conference and exhibition, e.g. vacating the venue, returning or securing hired materials, collating contact information for future events, analysing questionnaire data, incentives for feedback such as prizes or discount offers.

B4 Subcontracting

- External companies can be used to provide:
 - accommodation, e.g. budget chains, mid-price, luxury boutique hotels, self-catering, bed and breakfast (B&B), full board, room only, loyalty rewards
 - catering, e.g. fast food, seated restaurants, pop-up street food, drinks-only package, buffet style, set-course dinners, international cuisine, local food, dietary requirements
 - event support, e.g. organisations subcontracted to provide services such as venue sourcing, insurance brokering, specialist conference provision, e.g. medical conferences, display creation, acting agency
 - event-specific materials, e.g. lanyards, flowers, name badges, stationery
 - corporate gifts, e.g. personalised conference memorabilia
 - event entertainment for the delegates, e.g. agents for singers, musicians, theatre groups, speakers, storytellers, circus acts, magicians, dancers, casino providers
 - external entertainment, e.g. providing tickets for local attractions
 - marketing, e.g. website design, leaflet production, poster design, email copywriting, database management
 - team-building activities, e.g. paintballing, walking tours, Segway tours, baking courses.
- Working with subcontractors:
 - following service-level agreements (SLAs), contracts, channels of communication.

Learning aim C: Develop and review a proposal for a local, national or international event, conference or exhibition to meet client requirements

C1 Proposal for an event, conference or exhibition

- Suitability for specific target market and client requirements.
- Resources, contracting and logistical arrangements required.
- Timescales.
- Financial costings.

C2 Event planning and delegate management tools

- Gantt charts.
- Critical path analysis.
- Contemporary online planning tools and apps.

C3 Meeting client requirements

- Aims and objective of the event, conference or exhibition.
- Identifying criteria for measuring success of the event, conference or exhibition.
- Establishing timescales, roles and responsibilities.
- Working to an agreed budget.
- Contingency planning.
- Communicating with client to check all aspects of the proposal.

C4 Efficient financial costings

The types of items included in the costings will depend on the nature and scale of the event, conference or exhibition required by the client:

- costs associated with venue hire
- subcontracted external company supplier costs
- internal staff costs, including overtime
- transportation costs, e.g. flight, rail, coach, transportation between airport and venue
- accommodation costs, e.g. at venue, in nearby hotels or other accommodation suppliers
- marketing costs for promotion of event, e.g. design, printing and distribution of invitations
- materials costs, e.g. decoration of venue, gifts, banners, costumes
- insurance fees and costs associated with meeting health and safety requirements.

C5 Obtaining feedback

- Reviewing the proposal for the implementation with others, e.g. stakeholders, subject experts.
- Obtaining feedback, e.g. interviews, questionnaires, meetings.

C6 Reviewing the proposal, including financial costings

- Reviewing feedback collected and drawing conclusions.
- Suggesting improvements and further development.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore the range, scale and potential impact of events, conferences and exhibitions in the travel and tourism industry		A.D1 For each host area, evaluate the potential impact of the event, conference and exhibition and the potential impact of changing trends in the events, conferences and exhibitions sector.
A.P1 Compare one event, one conference and one exhibition in terms of their range, scale and potential impact on the host area. A.P2 Explain the changing trends in the events, conferences and exhibitions sector.	A.M1 For each host area, analyse the potential impact of the event, conference and exhibition and the potential impact of changing trends in the events, conferences and exhibitions sector.	
Learning aim B: Investigate the planning skills, methods and processes required before, during and after an event, conference and exhibition		B.D2 Evaluate the importance of the skills, methods and processes required in successfully planning and managing a selected event, conference and exhibition on a local, national and international scale.
B.P3 Compare the planning stages in preparing one event, one conference and one exhibition on a local, national and international scale. B.P4 Compare the processes involved in managing an event, conference and exhibition on a local, national and international scale.	B.M2 Analyse the skills, methods and processes required in successfully planning and managing a selected event, conference and exhibition on a local, national and international scale.	
Learning aim C: Develop and review a proposal for a local, national or international event, conference or exhibition to meet client requirements		C.D3 Use feedback to evaluate the effectiveness of the proposal and financial costing against client requirements, making recommendations for potential refinements.
C.P5 Produce a proposal and financial costing for a local, national or international event, conference or exhibition to meet client requirements. C.P6 Use feedback to review the extent to which the proposal and financial costing meet client requirements.	C.M3 Justify the choices made in developing the proposal and financial costing to meet client requirements.	

Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6* gives information on setting assignments and there is further information on our website.

There is a maximum number of three summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aim: B (B.P3, B.P4, B.M2, B.D2)

Learning aim: C (C.P5, C.P6, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

For this unit, learners must have access to a range of up-to-date publications, websites and research material to gain information about events, conferences and exhibitions and be able to demonstrate use of primary and secondary research methods.

Essential information for assessment decisions

Learning aim A

In order to achieve the assessment criteria for this learning aim, learners will select and research **three** items: **one event, one conference and one exhibition**. In selecting an event, conference and exhibition, learners must cover in total, **one** example of an **international** item, **one** example of a **national** item and one example of a **local** item. Teachers should ensure that the examples selected by learners provide sufficient scope to enable them to fully complete the assessments.

For distinction standard, learners will carry out a detailed, in-depth evaluation of the potential impact of the selected event, conference and exhibition on the host area. They will reflect on the changing trends in events, conferences and exhibitions, considering the potential implications for the host area. The impacts considered will all be relevant to the event, conference or exhibition and to the host area. The scale of the potential impact of the event, conference and exhibition and the scale of the potential impact of changing trends will all be thoroughly evaluated at the international, national or local level.

Learners will give specific details relating to the potential impacts of the conference, event and exhibition and the potential impacts of changing trends; these will be logically related to the conference, event or exhibition and to the host area in each case. Learners will articulate their arguments fluently and views concisely, giving an evaluation that makes reasoned, valid judgements.

For merit standard, learners will give a clear, balanced analysis of how each host area might potentially be impacted by the selected event, conference and exhibition. The analysis will consider the potential implications for the host areas of the changing trends in events, conferences and exhibitions.

The impacts considered will all be relevant to the event, conference or exhibition and to the host area, with discussion of scale of potential impact at the international, national or local level.

Learners will give specific, relevant examples of potential impacts and trends that affect each host area. The examples will be valid and clearly linked to their analysis. The evidence will be structured, with good-quality written communication and use of appropriate terminology.

For pass standard, learners will compare one event, one conference and one exhibition in terms of their range, scale and potential impact on the host area on a basic level. Most of the impacts considered will be relevant to the event, conference or exhibition and to the host area, with some understanding of scale of potential impact at the international, national or local level.

Learners will give an appropriate, realistic explanation of the changing trends in events, conferences and exhibitions. Learners will give reasons for the changes but the scope of the explanation and range of examples given might be limited or superficial in parts.

Learning aim B

Learners will select and research **three** items to produce evidence for this learning aim: **one event, one conference and one exhibition**. In selecting an event, conference and exhibition, learners must cover in total, one example of an **international** item, one example of a **national** item and one example of a **local** item.

For distinction standard, learners will thoroughly evaluate the importance of the skills, methods and processes required in successfully planning and managing a selected event, conference and exhibition on a local, national and international scale. Learners will show a thorough understanding of the link between skills and the methods and processes involved in preparing for an event, conference and exhibition, the expectations during it, as well as the tasks to complete when it has finished.

The evaluation will be sustained and clearly focused on the relative significance of different factors and interdependencies between them. Learners will give specific details relating to skills, methods and processes; these will be clearly related to the roles and objectives in planning and managing an event, conference and exhibition.

The evidence will demonstrate high-quality written/oral communication through use of accurate and fluent vocabulary to support a well-structured and considered response.

For merit standard, learners will give a clear analysis of the skills, methods and processes required in successfully planning and managing a selected event, conference and exhibition on a local, national and international scale. Learners will show sound understanding of processes involved in preparing for an event, conference and exhibition, the expectations during the event, conference and exhibition as well as the tasks to complete when it has finished.

The evidence will be reasoned and balanced, making clear references to the role of relevant skills, methods and processes in achieving a successful event, conference and exhibition. The evidence will be structured, with good-quality written communication and use of appropriate terminology.

For pass standard, learners will give a comparison of the planning stages and the processes involved in putting on an event, conference and exhibition. Learners will explain how the planning needs vary according to whether the brief is for an event, conference and exhibition and according to the scale of the event, conference and exhibition. They will give an accurate comparison of how the event management processes vary according to whether the brief is for an event, conference and exhibition and potential variations related to the scale of the event, conference and exhibition.

Learners' comparisons will be appropriate and realistic, however some minor inaccuracies may occur and the evidence might be superficial or limited in terms of the extent of variations considered. Learners will show a realistic understanding of the processes involved in preparing for an event, conference and exhibition, the expectations during the event, conference and exhibition, as well as the tasks to complete when it has finished.

Learning aim C

Learners will produce a proposal for a local, national or international event, conference or exhibition that meets client requirements. The proposal will include a financial costing for the proposal.

Learners will receive feedback on their proposal from at least two other people, which they will use to inform the review of their proposal.

For distinction standard, learners will thoroughly evaluate the effectiveness of the proposal and the financial costing against the client requirements, making recommendations for potential refinements.

Learners' evaluations must be informed by the feedback they have received on the proposal that they have developed. Learners' review of the proposal, including the financial costing, will be reasoned and convincing. They will give a reasoned evaluation of possible refinements to the proposal.

For merit standard, learners will give a clear justification of the choices made during the development of the proposal, including the costings involved, in order to meet client requirements. Learners must give a clear, well-reasoned justification of the choices they made in relation to the planning and costing of the event, conference or exhibition. They will refer to feedback, the alternatives they considered and reasons why these alternatives were rejected.

For pass standard, learners will prepare a proposal for a local, national or international event, conference or exhibition, which is appropriate and meets most of the client requirements. The financial costing for the event, conference or exhibition will be accurate and realistic but may not meet every aspect of the client requirements. Learners will review the proposal and financial costing in relation to the client's requirements and explain the extent to which these have been met.

Learners will obtain feedback from at least two other people on the proposal and financial costing they have developed. In reviewing their work and feedback from others, learners will consider both positive and negative aspects of the final outcomes in relation to the identified client requirements. The review may be unbalanced and/or superficial.

Links to other units

This unit links to:

- Unit 1: The World of Travel and Tourism
- Unit 2: Global Destinations
- Unit 9: Visitor Attractions
- Unit 10: Passenger Transport.

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers from events-management businesses
- work experience
- support from local events-management staff as mentors.

4 Planning your programme

How do I choose the right BTEC National qualification for my learners?

BTEC Nationals come in a range of sizes, each with a specific purpose. You will need to assess learners very carefully to ensure that they start on the right size of qualification to fit into their 16–19 study programme, and that they take the right pathways or optional units that allow them to progress to the next stage.

Some learners may want to take a number of complementary qualifications or keep their progression options open. These learners may be suited to taking a BTEC National Certificate or Extended Certificate. Learners who then decide to continue with a fuller vocational programme can transfer to a BTEC National Diploma or Extended Diploma, for example for their second year.

Some learners are sure of the sector they want to work in and are aiming for progression into that sector via higher education. These learners should be directed to the two-year BTEC National Extended Diploma as the most suitable qualification.

As a centre, you may want to teach learners who are taking different qualifications together. You may also wish to transfer learners between programmes to meet changes in their progression needs. You should check the qualification structures and unit combinations carefully as there is no exact match among the different sizes. You may find that learners need to complete more than the minimum number of units when transferring.

When learners are recruited, you need to give them accurate information on the title and focus of the qualification for which they are studying.

Is there a learner entry requirement?

As a centre it is your responsibility to ensure that learners who are recruited have a reasonable expectation of success on the programme. There are no formal entry requirements but we expect learners to have qualifications at or equivalent to Level 2.

Learners are most likely to succeed if they have:

- five GCSEs at good grades and/or
- BTEC qualification(s) at Level 2
- achievement in English and mathematics through GCSE or Functional Skills.

Learners may demonstrate ability to succeed in various ways. For example, learners may have relevant work experience or specific aptitude shown through diagnostic tests or non-educational experience.

What is involved in becoming an approved centre?

All centres must be approved before they can offer these qualifications – so that they are ready to assess learners and so that we can provide the support that is needed. Further information is given in *Section 8*.

What level of sector knowledge is needed to teach these qualifications?

We do not set any requirements for teachers but recommend that centres assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date. This will give learners a rich programme to prepare them for employment in the sector.

What resources are required to deliver these qualifications?

As part of your centre approval you will need to show that the necessary material resources and work spaces are available to deliver BTEC Nationals. For some units, specific resources are required. This is indicated in the units.

How can myBTEC help with planning for these qualifications?

myBTEC is an online toolkit that supports the delivery, assessment and quality assurance of BTECs in centres. It supports teachers with activities, such as choosing a valid combination of units, creating assignment briefs and creating assessment plans. For further information see *Section 10*.

Which modes of delivery can be used for these qualifications?

You are free to deliver BTEC Nationals using any form of delivery that meets the needs of your learners. We recommend making use of a wide variety of modes, including direct instruction in classrooms or work environments, investigative and practical work, group and peer work, private study and e-learning.

What are the recommendations for employer involvement?

BTEC Nationals are vocational qualifications and, as an approved centre, you are encouraged to work with employers on the design, delivery and assessment of the course to ensure that learners have a programme of study that is engaging and relevant and that equips them for progression. There are suggestions in many of the units about how employers could become involved in delivery and/or assessment but these are not intended to be exhaustive and there will be other possibilities at local level.

What support is available?

We provide a wealth of support materials, including curriculum plans, delivery guides, authorised assignment briefs, additional papers for external assessments and examples of marked learner work.

You will be allocated a Standards Verifier early on in the planning stage to support you with planning your assessments. There will be extensive training programmes as well as support from our Subject Advisor team.

For further details see *Section 10*.

How will my learners become more employable through these qualifications?

BTEC Nationals are mapped to relevant occupational standards (see *Appendix 1*).

Employability skills, such as team working and entrepreneurialism, and practical hands-on skills have been built into the design of the learning aims and content. This gives you the opportunity to use relevant contexts, scenarios and materials to enable learners to develop a portfolio of evidence that demonstrates the breadth of their skills and knowledge in a way that equips them for employment.

In some sectors there is also a logbook for use during work placement.

5 Assessment structure and external assessment

Introduction

BTEC Nationals are assessed using a combination of *internal assessments*, which are set and marked by teachers, and *external assessments* which are set and marked by Pearson:

- mandatory units have a combination of internal and external assessments
- all optional units are internally assessed.

We have taken great care to ensure that the assessment method chosen is appropriate to the content of the unit and in line with requirements from employers and higher education.

In developing an overall plan for delivery and assessment for the programme, you will need to consider the order in which you deliver units, whether delivery is over short or long periods and when assessment can take place. Some units are defined as synoptic units (see *Section 2*). Normally, a synoptic assessment is one that a learner would take later in a programme and in which they will be expected to apply learning from a range of units. Synoptic units may be internally or externally assessed. Where a unit is externally assessed you should refer to the sample assessment materials (SAMs) to identify where there is an expectation that learners draw on their wider learning. For internally-assessed units, you must plan the assignments so that learners can demonstrate learning from across their programme. A unit may be synoptic in one qualification and not another because of the relationship it has to the rest of the qualification.

We have addressed the need to ensure that the time allocated to final assessment of internal and external units is reasonable so that there is sufficient time for teaching and learning, formative assessment and development of transferable skills.

In administering internal and external assessment, the centre needs to be aware of the specific procedures and policies that apply, for example to registration, entries and results. An overview with signposting to relevant documents is given in *Section 7*.

Internal assessment

Our approach to internal assessment for these qualifications will be broadly familiar to experienced centres. It offers flexibility in how and when you assess learners, provided that you meet assessment and quality assurance requirements. You will need to take account of the requirements of the unit format, which we explain in *Section 3*, and the requirements for delivering assessment given in *Section 6*.

External assessment

A summary of the external assessment for this qualification is given in *Section 2*. You should check this information carefully, together with the unit specification and the sample assessment materials, so that you can timetable learning and assessment periods appropriately.

Learners must be prepared for external assessment by the time they undertake it. In preparing learners for assessment you will want to take account of required learning time, the relationship with other external assessments and opportunities for retaking. You should ensure that learners are not entered for unreasonable amounts of external assessment in one session. Learners may resit an external assessment to obtain a higher grade of near pass or above. If a learner has more than one attempt, then the best result will be used for qualification grading, up to the permitted maximum. It is unlikely that learners will need to or benefit from taking all assessments twice so you are advised to plan appropriately. Some assessments are synoptic and learners are likely to perform best if these assessments are taken towards the end of the programme.

Key features of external assessment in travel and tourism

In travel and tourism, after consultation with stakeholders, we have developed the following.

- Unit 1: The World of Travel and Tourism

This unit gives the foundation for learners to study other units in travel and tourism. They will explore all aspects of the industry: its terminology, its key components and its scale. The assessment consists of short- and long-answer questions related to the industry and how it operates.

- Unit 2: Global Destinations

Learners will investigate the location and features of global destinations. They will complete tasks to explain the features that give appeal to global destinations and support different types of tourism. They will evaluate how travel plans/routes/itineraries meet customer requirements and research other factors to determine why the popularity of global destinations may change.

Units

The externally-assessed units have a specific format which we explain in *Section 3*. The content of units will be sampled across external assessments over time, through appropriate papers and tasks. The ways in which learners are assessed are shown through the assessment outcomes and grading descriptors. External assessments are marked and awarded using the grade descriptors. The grades available are Distinction (D), Merit (M), Pass (P) and Near Pass (N). The Near Pass (N) grade gives learners credit below a Pass, where they have demonstrated evidence of positive performance which is worth more than an unclassified result but not yet at the Pass standard.

Sample assessment materials

Each externally-assessed unit has a set of sample assessment materials (SAMs) that accompanies this specification. The SAMs are there to give you an example of what the external assessment will look like in terms of the feel and level of demand of the assessment. In the case of units containing synoptic assessment, the SAMs will also show where learners are expected to select and apply from across the programme.

The SAMs show the range of possible question types that may appear in the actual assessments. They give you a good indication of how the assessments will be structured. While SAMs can be used for practice with learners as with any assessment, the content covered and specific details of the questions asked will change in each assessment.

A copy of each of these assessments can be downloaded from our website. To allow your learners further opportunities for practice, an additional sample of each of the Pearson-set units will be available before the first sitting of the assessment.

6 Internal assessment

This section gives an overview of the key features of internal assessment and how you, as an approved centre, can offer it effectively. The full requirements and operational information are given in the *Pearson Quality Assurance Handbook*. All members of the assessment team need to refer to this document.

For BTEC Nationals it is important that you can meet the expectations of stakeholders and the needs of learners by providing a programme that is practical and applied. Centres can tailor programmes to meet local needs and use links with local employers and the wider vocational sector.

When internal assessment is operated effectively it is challenging, engaging, practical and up to date. It must also be fair to all learners and meet national standards.

Principles of internal assessment

Assessment through assignments

For internally-assessed units, the format of assessment is an assignment taken after the content of the unit, or part of the unit if several assignments are used, has been delivered. An assignment may take a variety of forms, including practical and written types. An assignment is a distinct activity completed independently by learners that is separate from teaching, practice, exploration and other activities that learners complete with direction from, and formative assessment by, teachers.

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. There may be specific observed practical components during the assignment period. Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome based on the assessment criteria.

Assessment decisions through applying unit-based criteria

Assessment decisions for BTEC Nationals are based on the specific criteria given in each unit and set at each grade level. To ensure that standards are consistent in the qualification and across the suite as a whole, the criteria for each unit have been defined according to a framework. The way in which individual units are written provides a balance of assessment of understanding, practical skills and vocational attributes appropriate to the purpose of qualifications.

The assessment criteria for a unit are hierarchical and holistic. For example, if an M criterion requires the learner to show 'analysis' and the related P criterion requires the learner to 'explain', then to satisfy the M criterion a learner will need to cover both 'explain' and 'analyse'. The unit assessment grid shows the relationships among the criteria so that assessors can apply all the criteria to the learner's evidence at the same time. In *Appendix 2* we have set out a definition of terms that assessors need to understand.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessment team will give a grade for the unit. This is given simply according to the highest level for which the learner is judged to have met all the criteria. Therefore:

- to achieve a Distinction, a learner must have satisfied all the Distinction criteria (and therefore the Pass and Merit criteria); these define outstanding performance across the unit as a whole
- to achieve a Merit, a learner must have satisfied all the Merit criteria (and therefore the Pass criteria) through high performance in each learning aim
- to achieve a Pass, a learner must have satisfied all the Pass criteria for the learning aims, showing coverage of the unit content and therefore attainment at Level 3 of the national framework.

The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the Pass criteria should be reported as Unclassified.

The assessment team

It is important that there is an effective team for internal assessment. There are three key roles involved in implementing assessment processes in your centre, each with different interrelated responsibilities, the roles are listed below. Full information is given in the *Pearson Quality Assurance Handbook*.

- The Lead Internal Verifier (the Lead IV) has overall responsibility for the programme, its assessment and internal verification to meet our requirements, record keeping and liaison with the Standards Verifier. The Lead IV registers with Pearson annually. The Lead IV acts as an assessor, supports the rest of the assessment team, makes sure that they have the information they need about our assessment requirements and organises training, making use of our guidance and support materials.
- Internal Verifiers (IVs) oversee all assessment activity in consultation with the Lead IV. They check that assignments and assessment decisions are valid and that they meet our requirements. IVs will be standardised by working with the Lead IV. Normally, IVs are also assessors but they do not verify their own assessments.
- Assessors set or use assignments to assess learners to national standards. Before taking any assessment decisions, assessors participate in standardisation activities led by the Lead IV. They work with the Lead IV and IVs to ensure that the assessment is planned and carried out in line with our requirements.

Effective organisation

Internal assessment needs to be well organised so that the progress of learners can be tracked and so that we can monitor that assessment is being carried out in line with national standards. We support you through, for example, providing training materials and sample documentation. Our online myBTEC service can help support you in planning and record keeping. Further information on using myBTEC can be found in *Section 10* and on our website.

It is particularly important that you manage the overall assignment programme and deadlines to make sure that learners are able to complete assignments on time.

Learner preparation

To ensure that you provide effective assessment for your learners, you need to make sure that they understand their responsibilities for assessment and the centre's arrangements.

From induction onwards, you will want to ensure that learners are motivated to work consistently and independently to achieve the requirements of the qualifications. Learners need to understand how assignments are used, the importance of meeting assignment deadlines and that all the work submitted for assessment must be their own.

You will need to give learners a guide that explains how assignments are used for assessment, how assignments relate to the teaching programme and how learners should use and reference source materials, including what would constitute plagiarism. The guide should also set out your approach to operating assessment, such as how learners must submit work and request extensions.

Setting effective assignments

Setting the number and structure of assignments

In setting your assignments, you need to work with the structure of assignments shown in the *Essential information for assignments* section of a unit. This shows the structure of the learning aims and criteria that you must follow and the recommended number of assignments that you should use. For some units we provide authorised assignment briefs. For all the units we give you suggestions on how to create suitable assignments. You can find these materials along with this specification on our website. In designing your own assignment briefs you should bear in mind the following points.

- The number of assignments for a unit must not exceed the number shown in *Essential information for assignments*. However, you may choose to combine assignments, for example to create a single assignment for the whole unit.
- You may also choose to combine all or parts of different units into single assignments, provided that all units and all their associated learning aims are fully addressed in the programme overall. If you choose to take this approach, you need to make sure that learners are fully prepared so that they can provide all the required evidence for assessment and that you are able to track achievement in the records.
- A learning aim must always be assessed as a whole and must not be split into two or more tasks.
- The assignment must be targeted to the learning aims but the learning aims and their associated criteria are not tasks in themselves. Criteria are expressed in terms of the outcome shown in the evidence.
- For units containing synoptic assessment, the planned assignments must allow learners to select and apply their learning using appropriate self-management of tasks.
- You do not have to follow the order of the learning aims of a unit in setting assignments but later learning aims often require learners to apply the content of earlier learning aims and they may require learners to draw their learning together.
- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.
- As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning aims. The specified content is compulsory. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out one practical performance, or an investigation of one organisation, then they will address all the relevant range of content that applies in that instance.

Providing an assignment brief

A good assignment brief is one that, through providing challenging and realistic tasks, motivates learners to provide appropriate evidence of what they have learned.

An assignment brief should have:

- a vocational scenario, this could be a simple situation or a full, detailed set of vocational requirements that motivates the learner to apply their learning through the assignment
- clear instructions to the learner about what they are required to do, normally set out through a series of tasks
- an audience or purpose for which the evidence is being provided
- an explanation of how the assignment relates to the unit(s) being assessed.

Forms of evidence

BTEC Nationals have always allowed for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim being assessed. For many units, the practical demonstration of skills is necessary and for others, learners will need to carry out their own research and analysis. The units give you information on what would be suitable forms of evidence to give learners the opportunity to apply a range of employability or transferable skills. Centres may choose to use different suitable forms for evidence to those proposed. Overall, learners should be assessed using varied forms of evidence.

Full definitions of types of assessment are given in *Appendix 2*. These are some of the main types of assessment:

- written reports
- projects
- time-constrained practical assessments with observation records and supporting evidence
- recordings of performance
- sketchbooks, working logbooks, reflective journals
- presentations with assessor questioning.

The form(s) of evidence selected must:

- allow the learner to provide all the evidence required for the learning aim(s) and the associated assessment criteria at all grade levels
- allow the learner to produce evidence that is their own independent work
- allow a verifier to independently reassess the learner to check the assessor's decisions.

For example, when you are using performance evidence, you need to think about how supporting evidence can be captured through recordings, photographs or task sheets.

Centres need to take particular care that learners are enabled to produce independent work.

For example, if learners are asked to use real examples, then best practice would be to encourage them to use their own or to give the group a number of examples that can be used in varied combinations.

Making valid assessment decisions

Authenticity of learner work

Once an assessment has begun, learners must not be given feedback on progress towards fulfilling the targeted criteria.

An assessor must assess only learner work that is authentic, i.e. learners' own independent work. Learners must authenticate the evidence that they provide for assessment through signing a declaration stating that it is their own work.

Assessors must ensure that evidence is authentic to a learner through setting valid assignments and supervising them during the assessment period. Assessors must take care not to provide direct input, instructions or specific feedback that may compromise authenticity.

Assessors must complete a declaration that:

- the evidence submitted for this assignment is the learner's own
- the learner has clearly referenced any sources used in the work
- they understand that false declaration is a form of malpractice.

Centres can use Pearson templates or their own templates to document authentication.

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. Further information is given in *Section 7*.

Making assessment decisions using criteria

Assessors make judgements using the criteria. The evidence from a learner can be judged using all the relevant criteria at the same time. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive. For example, the inclusion of a concluding section may be insufficient to satisfy a criterion requiring 'evaluation'.

Assessors should use the following information and support in reaching assessment decisions:

- the *Essential information for assessment decisions* section in each unit gives examples and definitions related to terms used in the criteria
- the explanation of key terms in *Appendix 2*
- examples of assessed work provided by Pearson
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Pass and Merit criteria relate to individual learning aims. The Distinction criteria as a whole relate to outstanding performance across the unit. Therefore, criteria may relate to more than one learning aim (for example A.D1) or to several learning aims (for example DE.D3). Distinction criteria make sure that learners have shown that they can perform consistently at an outstanding level across the unit and/or that they are able to draw learning together across learning aims.

Dealing with late completion of assignments

Learners must have a clear understanding of the centre policy on completing assignments by the deadlines that you give them. Learners may be given authorised extensions for legitimate reasons, such as illness at the time of submission, in line with your centre policies.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others. Therefore, learners who do not complete assignments by your planned deadline or the authorised extension deadline may not have the opportunity to subsequently resubmit.

If you accept a late completion by a learner, then the assignment should be assessed normally when it is submitted using the relevant assessment criteria.

Issuing assessment decisions and feedback

Once the assessment team has completed the assessment process for an assignment, the outcome is a formal assessment decision. This is recorded formally and reported to learners.

The information given to the learner:

- must show the formal decision and how it has been reached, indicating how or where criteria have been met
- may show why attainment against criteria has not been demonstrated
- must not provide feedback on how to improve evidence
- must be validated by an IV before it is given to the learner.

Resubmission of improved evidence

An assignment provides the final assessment for the relevant learning aims and is normally a final assessment decision, except where the Lead IV approves one opportunity to resubmit improved evidence based on the completed assignment brief.

The Lead IV has the responsibility to make sure that resubmission is operated fairly. This means:

- checking that a learner can be reasonably expected to perform better through a second submission, for example that the learner has not performed as expected
- making sure that giving a further opportunity can be done in such a way that it does not give an unfair advantage over other learners, for example through the opportunity to take account of feedback given to other learners
- checking that the assessor considers that the learner will be able to provide improved evidence without further guidance and that the original evidence submitted remains valid.

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days in the same academic year.

A resubmission opportunity must not be provided where learners:

- have not completed the assignment by the deadline without the centre's agreement
- have submitted work that is not authentic.

Retake of internal assessment

A learner who has not achieved the level of performance required to pass the relevant learning aims after resubmission of an assignment may be offered a single retake opportunity using a new assignment. The retake may only be achieved at a Pass.

The Lead Internal Verifier must only authorise a retake of an assignment in exceptional circumstances where they believe it is necessary, appropriate and fair to do so. For further information on offering a retake opportunity, you should refer to the *BTEC Centre Guide to Internal Assessment*. We provide information on writing assignments for retakes on our website (www.btec.co.uk/keydocuments).

Planning and record keeping

For internal processes to be effective, an assessment team needs to be well organised and keep effective records. The centre will also work closely with us so that we can quality assure that national standards are being satisfied. This process gives stakeholders confidence in the assessment approach.

The Lead IV must have an assessment plan, produced as a spreadsheet or using myBTEC.

When producing a plan, the assessment team may wish to consider:

- the time required for training and standardisation of the assessment team
- the time available to undertake teaching and carry out assessment, taking account of when learners may complete external assessments and when quality assurance will take place
- the completion dates for different assignments
- who is acting as IV for each assignment and the date by which the assignment needs to be verified
- setting an approach to sampling assessor decisions through internal verification that covers all assignments, assessors and a range of learners
- how to manage the assessment and verification of learners' work so that they can be given formal decisions promptly
- how resubmission opportunities can be scheduled.

The Lead IV will also maintain records of assessment undertaken. The key records are:

- verification of assignment briefs
- learner authentication declarations
- assessor decisions on assignments, with feedback given to learners
- verification of assessment decisions.

Examples of records and further information are given in the *Pearson Quality Assurance Handbook*.

7 Administrative arrangements

Introduction

This section focuses on the administrative requirements for delivering a BTEC qualification. It will be of value to Quality Nominees, Lead IVs, Programme Leaders and Examinations Officers.

Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification and that appropriate arrangements are made for internal and external assessment. You need to refer to the *Information Manual* for information on making registrations for the qualification and entries for external assessments.

Learners can be formally assessed only for a qualification on which they are registered. If learners' intended qualifications change, for example if a learner decides to choose a different pathway specialism, then the centre must transfer the learner appropriately.

Access to assessment

Both internal and external assessments need to be administered carefully to ensure that all learners are treated fairly, and that results and certification are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires that all learners should have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner. We are committed to making sure that:

- learners with a protected characteristic are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications*.

Administrative arrangements for internal assessment

Records

You are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in the *Information Manual*. We may ask to audit your records so they must be retained as specified.

Reasonable adjustments to assessment

A reasonable adjustment is one that is made before a learner takes an assessment to ensure that they have fair access to demonstrate the requirements of the assessments. You are able to make adjustments to internal assessments to take account of the needs of individual learners. In most cases this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

Further details on how to make adjustments for learners with protected characteristics are given on our website in the document *Supplementary guidance for reasonable adjustment and special consideration in vocational internally-assessed units*.

Special consideration

Special consideration is given after an assessment has taken place for learners who have been affected by adverse circumstances, such as illness. You must operate special consideration in line with our policy (see previous paragraph). You can provide special consideration related to the period of time given for evidence to be provided or for the format of the assessment if it is equally valid. You may not substitute alternative forms of evidence to that required in a unit, or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration in line with the policy.

Appeals against assessment

Your centre must have a policy for dealing with appeals from learners. These appeals may relate to assessment decisions being incorrect or assessment not being conducted fairly. The first step in such a policy could be a consideration of the evidence by a Lead IV or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to learners. If there is an appeal by a learner, you must document the appeal and its resolution. Learners have a final right of appeal to Pearson but only if the procedures that you have put in place have not been followed. Further details are given in the document *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy*.

Administrative arrangements for external assessment

Entries and resits

For information on the timing of assessment and entries, please refer to the annual examinations timetable on our website.

Access arrangements requests

Access arrangements are agreed with Pearson before an assessment. They allow students with special educational needs, disabilities or temporary injuries to:

- access the assessment
- show what they know and can do without changing the demands of the assessment.

Access arrangements should always be processed at the time of registration. Learners will then know what type of arrangements are available in place for them.

Granting reasonable adjustments

For external assessment, a reasonable adjustment is one that we agree to make for an individual learner. A reasonable adjustment is defined for the individual learner and informed by the list of available access arrangements.

Whether an adjustment will be considered reasonable will depend on a number of factors, to include:

- the needs of the learner with the disability
- the effectiveness of the adjustment
- the cost of the adjustment; and
- the likely impact of the adjustment on the learner with the disability and other learners.

Adjustment may be judged unreasonable and not approved if it involves unreasonable costs, timeframes or affects the integrity of the assessment.

Special consideration requests

Special consideration is an adjustment made to a learner's mark or grade after an external assessment to reflect temporary injury, illness or other indisposition at the time of the assessment. An adjustment is made only if the impact on the learner is such that it is reasonably likely to have had a material effect on that learner being able to demonstrate attainment in the assessment.

Centres are required to notify us promptly of any learners who they believe have been adversely affected and request that we give special consideration. Further information can be found in the special requirements section on our website.

Conducting external assessments

Centres must make arrangements for the secure delivery of external assessments. External assessments for BTEC qualifications include examinations, set tasks and performance.

Each external assessment has a defined degree of control under which it must take place. Some external assessments may have more than one part and each part may have a different degree of control. We define degrees of control as follows.

High control

This is the completion of assessment in formal invigilated examination conditions.

Medium control

This is completion of assessment, usually over a longer period of time, which may include a period of controlled conditions. The controlled conditions may allow learners to access resources, prepared notes or the internet to help them complete the task.

Low control

These are activities completed without direct supervision. They may include research, preparation of materials and practice. The materials produced by learners under low control will not be directly assessed.

Further information on responsibilities for conducting external assessment is given in the document *Instructions for Conducting External Assessments*, available on our website.

Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, the certification of qualifications, and/or that may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actions (or attempted actions) of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where incidents (or attempted incidents) of malpractice have been proven.

Malpractice may arise or be suspected in relation to any unit or type of assessment within the qualification. For further details regarding malpractice and advice on preventing malpractice by learners, please see Pearson's *Centre guidance: Dealing with malpractice and maladministration in vocational qualifications*, available on our website.

The procedures we ask you to adopt vary between units that are internally-assessed and those that are externally assessed.

Internally-assessed units

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe that a centre is failing to conduct internal assessment according to our policies. The above document gives further information, examples and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Externally-assessed units

External assessment means all aspects of units that are designated as external in this specification, including preparation for tasks and performance. For these assessments, centres must follow the JCQ procedures set out in the latest version of *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* (www.jcq.org.uk).

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Learner malpractice

Heads of Centres are required to report incidents of any suspected learner malpractice that occur during Pearson external assessments. We ask that centres do so by completing a *JCQ Form M1* (available at www.jcq.org.uk/exams-office/malpractice) and emailing it and any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Team at candidatemalpractice@pearson.com. The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

Learners must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Learners found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

Teacher/centre malpractice

Heads of Centres are required to inform Pearson's Investigations Team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. Heads of centres are requested to inform the Investigations Team by submitting a *JCQ Form M2(a)* (available at www.jcq.org.uk/exams-office/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff or anonymous informants), the Investigations Team will conduct the investigation directly or may ask the head of centre to assist.

Incidents of maladministration (accidental errors in the delivery of Pearson qualifications that may affect the assessment of learners) should also be reported to the Investigations Team using the same method.

Heads of Centres/Principals/Chief Executive Officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights; see Section 6.15 of the *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* document.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results and/or certificates while an investigation is in progress. Depending on the outcome of the investigation results and/or certificates may be released or withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- mark reduction for external assessments
- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from Heads of Centres (on behalf of learners and/or members of staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy*, which is on our website. In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via pqsmalpractice@pearson.com who will inform you of the next steps.

Certification and results

Once a learner has completed all the required components for a qualification, even if final results for external assessments have not been issued, then the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures please refer to our *Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

Results issue

After the external assessment session, learner results will be issued to centres. The result will be in the form of a grade. You should be prepared to discuss performance with learners, making use of the information we provide and post-results services.

Post-assessment services

Once results for external assessments are issued, you may find that the learner has failed to achieve the qualification or to attain an anticipated grade. It is possible to transfer or reopen registration in some circumstances. The *Information Manual* gives further information.

Changes to qualification requests

Where a learner who has taken a qualification wants to resit an externally-assessed unit to improve their qualification grade, you firstly need to decline their overall qualification grade. You may decline the grade before the certificate is issued. For a learner receiving their results in August, you should decline the grade by the end of September if the learner intends to resit an external assessment.

Additional documents to support centre administration

As an approved centre you must ensure that all staff delivering, assessing and administering the qualifications have access to this documentation. These documents are reviewed annually and are reissued if updates are required.

- *Pearson Quality Assurance Handbook*: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- *Information Manual*: this gives procedures for registering learners for qualifications, transferring registrations, entering for external assessments and claiming certificates.
- *Lead Examiners' Reports*: these are produced after each series for each external assessment and give feedback on the overall performance of learners in response to tasks or questions set.
- *Instructions for the Conduct of External Assessments (ICEA)*: this explains our requirements for the effective administration of external assessments, such as invigilation and submission of materials.
- *Regulatory policies*: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
 - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
 - age of learners
 - centre guidance for dealing with malpractice
 - recognition of prior learning and process.

This list is not exhaustive and a full list of our regulatory policies can be found on our website.

8 Quality assurance

Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality legislation.
- Centres should refer to the teacher guidance section in individual units to check for any specific resources required.

Continuing quality assurance and standards verification

On an annual basis, we produce the *Pearson Quality Assurance Handbook*. It contains detailed guidance on the quality processes required to underpin robust assessment and internal verification.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; it must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres a range of materials and opportunities, through online standardisation, intended to exemplify the processes required for effective assessment, and examples of effective standards. Approved centres must use the materials and services to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Level 3 include:

- making sure that all centres complete appropriate declarations at the time of approval
- undertaking approval visits to centres
- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment
- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation
- an overarching review and assessment of a centre's strategy for delivering and quality assuring its BTEC programmes, for example making sure that synoptic units are placed appropriately in the order of delivery of the programme.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for all BTEC Level 3 programmes. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

9 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in awarding a qualification and in providing an overall qualification grade for each learner. It shows how all the qualifications in this sector are graded.

The awarding and certification of these qualifications will comply with regulatory requirements.

Eligibility for an award

In order to be awarded a qualification, a learner must complete all units, achieve a Near Pass (N) or above in all external units and a Pass or above in all mandatory units unless otherwise specified. Refer to the structure in *Section 2*.

To achieve any qualification grade, learners must:

- complete and **have an outcome** (D, M, P, N or U) for all units within a valid combination
- achieve the **required units at Pass or above** shown in *Section 2*, and for the Extended Diploma achieve a minimum 900 GLH at Pass or above (or N or above in external units)
- achieve the **minimum number of points** at a grade threshold.

It is the responsibility of a centre to ensure that a correct unit combination is adhered to.

Learners who do not achieve the required minimum grade (N or P) in units shown in the structure will not achieve a qualification.

Learners who do not achieve sufficient points for a qualification or who do not achieve all the required units may be eligible to achieve a smaller qualification in the same suite provided they have completed and achieved the correct combination of units and met the appropriate qualification grade points threshold.

Calculation of the qualification grade

The final grade awarded for a qualification represents an aggregation of a learner's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number of optional units, the mandatory units along with the optional units with the highest grades will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

BTEC Nationals are Level 3 qualifications and are awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate, Extended Certificate, Foundation Diploma	P to D*
Diploma	PP to D*D*
Extended Diploma	PPP to D*D*D*

The *Calculation of qualification grade* table, shown further on in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. The most up to date table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. The *Information Manual* gives full information.

Points available for internal units

The table below shows the number of **points** available for internal units. For each internal unit, points are allocated depending on the grade awarded.

	Unit size	
	60 GLH	90 GLH
U	0	0
Pass	6	9
Merit	10	15
Distinction	16	24

Points available for external units

Raw marks from the external units will be awarded **points** based on performance in the assessment. The table below shows the **minimum number of points** available for each grade in the external units.

	Unit size	
	90 GLH	120 GLH
U	0	0
Near Pass	6	8
Pass	9	12
Merit	15	20
Distinction	24	32

Pearson will automatically calculate the points for each external unit once the external assessment has been marked and grade boundaries have been set. For more details about how we set grade boundaries in the external assessment please go to our website.

Claiming the qualification grade

Subject to eligibility, Pearson will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant *Calculation of qualification grade* table for the cohort.

Calculation of qualification grade

Applicable for registration from 1 September 2019.

Certificate		Extended Certificate		Foundation Diploma	
180 GLH		360 GLH		510 GLH	
Grade	Points threshold	Grade	Points threshold	Grade	Points threshold
U	0	U	0	U	0
Pass	18	Pass	36	P	51
Merit	26	Merit	52	M	73
Distinction	42	Distinction	74	D	104
D*	48	D*	90	D*	130

The table is subject to review over the lifetime of the qualification.
The most up-to-date version will be issued on our website.

Examples of grade calculations based on table applicable to registrations from September 2019

Example 1: Achievement of an Extended Certificate with a P grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	90	Ext	Near Pass	6
Unit 2	120	Ext	Pass	12
Unit 3	90	Int	Merit	15
Unit 9	60	Int	Pass	6
Totals	360		P	39

The learner has achieved a Near Pass or above in Units 1 and 2 and a Pass or above in Unit 3.

The learner has sufficient points for a P grade.

Example 2: Achievement of an Extended Certificate with a D grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	90	Ext	Merit	15
Unit 2	120	Ext	Merit	20
Unit 3	90	Int	Distinction	24
Unit 9	60	Int	Distinction	16
Totals	360		D	75

The learner has sufficient points for a D grade.

Example 3: An Unclassified Result for an Extended Certificate

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	90	Ext	Unclassified	0
Unit 2	120	Ext	Merit	20
Unit 3	90	Int	Distinction	24
Unit 9	60	Int	Merit	10
Totals	360		U	54

The learner has a U in Unit 1.

The learner has sufficient points for a M but has not achieved the minimum requirement of a Near Pass or above in Unit 1.

10 Resources and support

Our aim is to give you a wealth of resources and support to enable you to deliver BTEC National qualifications with confidence. On our website you will find a list of resources to support teaching and learning, and professional development.

Support for setting up your course and preparing to teach

Specification

This **specification** (for teaching from September 2019) includes details on the administration of qualifications and information on all the units for the qualification.

Delivery Guide

This free guide gives you important advice on how to choose the right course for your learners and how to ensure you are fully prepared to deliver the course. It explains the key features of BTEC Nationals (for example employer involvement and employability skills). It also covers guidance on assessment (internal and external) and quality assurance. The guide tells you where you can find further support and gives detailed unit-by-unit delivery guidance. It includes teaching tips and ideas, assessment preparation and suggestions for further resources.

Schemes of work

Free sample schemes of work are provided for each mandatory unit. These are available in Word™ format for ease of customisation.

Curriculum models

These show how the BTECs in the suite fit into a 16–19 study programme, depending on their size and purpose. The models also show where other parts of the programme, such as work experience, maths and English, tutorial time and wider study, fit alongside the programme.

Study skills activities

A range of case studies and activities is provided; they are designed to help learners develop the study skills they need to successfully complete their BTEC course. The case studies and activities are provided in Word™ format for easy customisation.

myBTEC

myBTEC is a free, online toolkit that lets you plan and manage your BTEC provision from one place. It supports the delivery, assessment and quality assurance of BTECs in centres and supports teachers with the following activities:

- checking that a programme is using a valid combination of units
- creating and verifying assignment briefs (including access to a bank of authorised assignment briefs that can be customised)
- creating assessment plans and recording assessment decisions
- tracking the progress of every learner throughout their programme.

To find out more about myBTEC, visit the myBTEC page on the support services section of our website. We will add the new BTEC National specifications to myBTEC as soon as possible.

Support for teaching and learning

Pearson Learning Services provides a range of engaging resources to support BTEC Nationals, including:

- textbooks in e-book and print formats
- revision guides and revision workbooks in e-book and print formats
- teaching and assessment packs, including e-learning materials via the Active Learn Digital Service.

Teaching and learning resources are also available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources can be found on our website.

Support for assessment

Sample assessment materials for externally-assessed units

Sample assessments are available for the Pearson-set units. One copy of each of these assessments can be downloaded from the website/available in print. For each suite, an additional sample for one of the Pearson-set units is also available, allowing your learners further opportunities for practice.

Further sample assessments will be made available through our website on an ongoing basis.

Sample assessment materials for internally-assessed units

We do not prescribe the assessments for the internally-assessed units. Rather, we allow you to set your own, according to your learners' preferences and to link with your local employment profile.

We do provide a service in the form of Authorised Assignment Briefs, which are approved by Pearson Standards Verifiers. They are available via our website or free on myBTEC.

Sample marked learner work

To support you in understanding the expectation of the standard at each grade, examples of marked learner work at PM/MD grades are linked to the Authorised Assignment Briefs.

Training and support from Pearson

People to talk to

There are many people who are available to support you and provide advice and guidance on delivery of your BTEC Nationals. These include:

- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and so can answer sector-specific queries on planning, teaching, learning and assessment
- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, and support you in preparing learner work and providing quality assurance through sampling
- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events
- Customer Services – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

Training and professional development

Pearson provides a range of training and professional development events to support the introduction, delivery, assessment and administration of BTEC National qualifications. These sector-specific events, developed and delivered by specialists, are available both face to face and online.

'Getting Ready to Teach'

These events are designed to get teachers ready for delivery of the BTEC Nationals. They include an overview of the qualifications' structures, planning and preparation for internal and external assessment, and quality assurance.

Teaching and learning

Beyond the 'Getting Ready to Teach' professional development events, there are opportunities for teachers to attend sector- and role-specific events. These events are designed to connect practice to theory; they provide teacher support and networking opportunities with delivery, learning and assessment methodology.

Details of our training and professional development programme can be found on our website.

Appendix 1 Links to industry standards

BTEC Nationals have been developed in consultation with industry and appropriate sector bodies to ensure that the qualification content and approach to assessment aligns closely to the needs of employers. Where they exist, and are appropriate, National Occupational Standards (NOS) and professional body standards have been used to establish unit content.

Appendix 2 Glossary of terms used for internally-assessed units

This is a summary of the key terms used to define the requirements in the units.

Term	Definition
Carry out	Learners demonstrate skills through practical activities, carrying out or executing what has to be done in line with certain requirements. Learners do this in order to complete an identified activity or to demonstrate personal achievement for an audience.
Create	Learners bring something into existence, e.g. itineraries, plans or proposals.
Demonstrate	Learners' work, performance or practice shows the ability to carry out and apply knowledge, understanding and/or skills in a practical situation.
Design	Learners apply skills and knowledge to the process of deciding on the form, function and characteristics of a product, service or process.
Develop	Learners acquire and apply skills and understanding through practical activities that involve the use of concepts, processes or techniques to expand or progress something.
Evaluate	Learners' work draws on varied information, themes or concepts to consider aspects such as: <ul style="list-style-type: none"> • strengths or weaknesses • advantages or disadvantages • alternative actions • relevance or significance. Learners' enquiries should lead to a supported judgement showing relationship to its context. This will often be in a conclusion. Evidence will often be written but could be through presentation or activity.
Examine	Learners select and apply knowledge to less familiar contexts.
Explore	Learners apply their skills and/or knowledge in contexts involving practical research or investigation.
Investigate	Learners' application of knowledge is based on personal research and development.
Prepare	Learners gather materials, information, techniques and/or procedures in readiness to undertake a process and/or make something ready for use.
Reflect (on)	Learners consider their own performance and/or skills and development in relation to a specific scenario or scenarios and/or wider context(s). This may include feedback from others. There is often a requirement for learners to identify strengths and areas for improvement, along with a personal development or action plan.

Term	Definition
Review	Learners make a formal assessment. They appraise existing information, or prior events, or reconsider information with the intention of making changes if necessary. This may or may not be in the context of own learning and skills development.
Understand	Learners demonstrate knowledge related to defined situations.
Analyse	Learners present the outcome of methodical and detailed examination either: <ul style="list-style-type: none"> • breaking down a theme, topic or situation in order to interpret and study the interrelationships between the parts and/or • of information or data to interpret and study key trends and interrelationships. Analysis could be through activity, practice, written or verbal presentation.
Assess	Learners present a careful consideration of varied factors or events that apply to a specific situation, or identify those which are the most important or relevant and arrive at a conclusion.
Compare	Learners identify the main factors relating to two or more items/situations or aspects of a subject and explain the similarities, differences, advantages and disadvantages. This is used to show depth of knowledge through selection of characteristics.
Complete	Learners make or do all the necessary parts in order to finish a task.
Explain	Learners provide detail and reasons and/or evidence to support an opinion, view or argument.
Identify	Learners indicate the main features or purpose of something by recognising it, locating it and/or being able to discern and understand facts or qualities, e.g. a geographical feature or destination on a map.
Interpret	Learners state the meaning, purpose or qualities of something through the use of images, words or other expressions.
Justify	Learners give reasons or evidence to: <ul style="list-style-type: none"> • support an opinion; or • prove something right or reasonable.
Outline	Learners' work, performance or practice provides a summary, overview or brief description of something.
Participate	Learners take part in a practical activity in order to demonstrate knowledge and/or skills in relation to a specific task or context.
Plan	Learners create a way of carrying out a task or series of tasks to achieve specific requirements or objectives, showing progress from start to finish or progress within specified points in the task(s).

Term	Definition
Plot	Using maps and/or plans, diagrams and charts with multiple points, learners apply knowledge and/or skills to accurately identify and/or show the relationship between specific points or items.
Produce	Learners' knowledge, understanding and/or skills are applied to develop a particular type of evidence, for example a proposal, plan, product, service or report.
Recommend/make recommendations	Learners suggest particular action(s) that should be done.
Research	Learners proactively seek information from primary and secondary sources.

This is a key summary of the types of evidence used for BTEC Nationals.

Type of evidence	Definition and purpose
Article	Information on a specified topic or related topics, usually based on information gathered during relevant research and presented in a format that considers the requirements of a specified audience, using appropriate tone, language and structure. Examples could include creating content for a newspaper, magazine, journal or website.
Bibliography using Harvard Referencing System	A detailed list of books and other sources, used by learners as part of their research and which has been incorporated into their work. Sources could include: published resources, textbooks, the internet, journal articles and trade magazines. Learners should refer to the most current resources available. In-text citations should be included, together with a comprehensive bibliography at the end of the document. Learners should use the Harvard Referencing System. Harvard in-text referencing requires learners to indicate both the author's surname and date in brackets, either immediately after the reference or directly at the end of the sentence.
Case study	A specific example to which all learners must select and apply knowledge. Used to show application to a realistic context where direct experience cannot be gained.
Costing/financial costing	Information that is presented in an appropriate financial format, detailing the estimated cost of doing or producing something, e.g. a travel itinerary or an event.
Development log	A record kept by learners to show the process of development. Used to show method, self-management and skill(s) development.
Email	A communication that gives information and is written using appropriate technology for a defined purpose in a task or activity.

Type of evidence	Definition and purpose
Guide	Information presented in written or other forms, e.g. diagrams, charts, slideshows, video clips. Offers information and/or advice to a particular audience on a specified subject or issue, e.g. destination guide.
Independent research	An analysis of substantive research organised by learners from secondary and, if applicable, primary sources.
Individual project	A self-directed, large-scale activity requiring planning, research, exploration, outcome and review. Used to show self-management, project management and/or deep learning, including synopticity.
Itinerary	A structured travel document giving a range of details and information with dates, times and places.
Letter	Written communication for a defined purpose in a task or activity. Usually the letter is required to meet stipulated criteria in terms of structure and/or format and level of formality.
Logbook/journal	Completion of a log or journal, usually in the context of work experience in order to record skills, knowledge and understanding acquired for employability. Also used to record reflective accounts and plan for personal and professional development. Learners must keep all other relevant evidence, including witness statements and observation records with their logs.
Observation record/statement/sheet	Used to provide a formal record of a judgement of learners' performance (e.g. during presentations, practical activities) against the targeted assessment criteria. It must be completed by the assessor of the unit or qualification. An observation record alone does not confer an assessment decision.
Personal development plan/personal skills development plan	A plan produced by learners to record, evaluate and act on areas of strength and weakness. Specific actions to improve knowledge and/or skills will be included in the plan, along with goals and ways of measuring progress.
Personal/professional development portfolio	A record kept by learners to show their process of personal and/or professional development. Used to show method, self-management and skill(s) development to meet required outcomes for assessment purposes.
Plan	Learners produce a plan as an outcome related to a specific or limited task/series of tasks that require(s) learners to achieve specified requirements or objectives.

Type of evidence	Definition and purpose
Presentation	Learners provide information and/or an item(s). The presentation may be given through oral or practical demonstration to a specified audience and goal, often using visual slides or other visual aids to show information.
Portfolio	A collection of documents or other forms of information that demonstrate knowledge-based skills and work that has been undertaken to be assessed as evidence to meet required skills outcomes.
Poster/leaflet	Documents providing well-presented information for a specified purpose.
Professional supporting documentation	Documents such as letters, emails, spreadsheets or memos that are produced by learners to support another item of evidence, e.g. a proposal, costing, itinerary or plan. The supporting documents usually provide contextual or additional information such as an introduction, rationale or timeframe for the other item of evidence.
Proposal	A plan that defines and outlines something to be designed and/or developed and/or implemented. The proposal usually also outlines the methods/processes/procedures and resources required in order to achieve a desired objective/outcome. A research proposal outlines details of an issue to be investigated and how the research will be conducted. It also includes a plan that needs to be designed to set targets, monitor progress and help ensure that the aims of the research project are achieved.
Reference list	A detailed list of books and other sources referred to during learners' research.
Report	Learners adhere to protocols, codes and conventions in setting out findings or judgements in an objective way. A formal report will adhere to a given structure making use of headings and sub-headings, e.g. a heading, introduction, findings, conclusion and recommendations.
Research portfolio	A collection of documents or other forms of information that demonstrate knowledge-based skills and enquiry work that has been undertaken to be assessed as evidence to meet required skills outcomes. The research portfolio contains evidence of primary and/or secondary research.
Resource portfolio	A collection of relevant documents or other forms of information on a specified issue or number of specified issues. The production of the resource portfolio could be a stand-alone task or inform another task that is to be carried out, e.g. a presentation, plan or proposal.
Role play/simulated activity	A multi-faceted activity simulating realistic work situations.

Type of evidence	Definition and purpose
Teacher observation	Used to provide a formal record of a judgement of learners' performance (e.g. during presentations, practical activities and role play) against the targeted assessment criteria. It must be completed by the assessor of the unit or qualification. An observation record alone does not confer an assessment decision.
Witness statement(s)	Used to provide a written record of learners' performance against targeted assessment criteria, often (but not exclusively) in the context of work experience. Any competent person who has witnessed the skills being demonstrated can complete a witness statement, including staff who do not have direct knowledge of the qualification, unit or evidence requirements, but who are able to make a professional judgement about learners' performance in a given situation.

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