

# Model Assignment

## Issued September 2007

OCR Level 3 Nationals in Travel and Tourism

Unit 3: Marketing travel and tourism

**Please note:**

**This OCR model assignment may be used to provide evidence for the unit above. Alternatively, centres may wish to adapt this assignment or devise their own assignment for the purposes of assessment. It is the centre's responsibility to ensure that any adaptations made to this assignment allow candidates to meet all the assessment objectives and provide sufficient opportunity for candidates to demonstrate achievement across the full range of grades.**

**The scheme codes for these qualifications are:**

OCR Level 3 National Certificate in Travel and Tourism	03725
OCR Level 3 National Diploma in Travel and Tourism	03726
OCR Level 3 National Extended Diploma in Travel and Tourism	03727

**The QCA Accreditation Number for this unit is:**

Unit 3: Marketing travel and tourism	A/102/6204
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This OCR model assignment remains live for the life of these qualifications.

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# Model Assignment: Tutor Information

OCR Level 3 Nationals in Travel and Tourism

Unit 3: Marketing travel and tourism

# Guidance For Centres

## 1 General

- 1.1 OCR model assignments are issued free to centres on approval and are available to download from our website: [www.ocr.org.uk](http://www.ocr.org.uk).
- 1.2 Centres may choose to:
  - use OCR model assignments for formal summative assessment of candidates
  - tailor OCR model assignments for formal summative assessment of candidates
  - use OCR model assignments as a benchmark for devising their own assignment.
- 1.3 This assignment has been designed to meet the full assessment requirements of the unit. Candidates will need to take part in a planned learning programme that covers the underpinning knowledge and skills of the unit.

## 2 Before carrying out the assignment

- 2.1 Candidates should be provided with a copy of the *Candidate Information* section of this assignment.
- 2.2 Candidates may carry out preparations prior to undertaking the tasks; there is no time limit for this.

## 3 When completing the assignment

- 3.1 Candidates should be allowed sufficient time to complete all of the tasks. The amount of time may vary depending on the nature of the tasks and the ability of individual candidates. It is suggested that evidence is produced in several sessions.
- 3.2 Each candidate must produce individual and authentic evidence for each task within the assignment.
- 3.3 Centre staff may give support and guidance to candidates. This support and guidance should focus on checking that candidates understand what is expected of them. It is not acceptable for tutors to provide model answers or to work through answers in detail.
- 3.4 Candidates may use information from any relevant source to help them with producing evidence for the tasks.
- 3.5 It is acknowledged that candidates in their responses may refer to situations in the scenario but as the scenario is fictitious this does not break any rules of confidentiality. However, candidates must be guided on the use of information from other sources to ensure that confidentiality is maintained at all times.

#### **4 After completing the assignment**

- 4.1 Candidates' evidence is assessed by the centre's assessor against the qualification specification contained in the Centre Handbook. When grading candidates' work centres **must** use the grading descriptors in the unit. For further information about assessment please refer to the section on Assessment and Moderation in the Centre Handbook.
- 4.2 Assessors' decisions should be quality assured across the centre through internal moderation. For further information about internal moderation please refer to the section on Assessment and Moderation in the Centre Handbook.

#### **5 Presentation of work**

- 5.1 Candidates may use the *Candidate Checklist* provided to ensure that they submit evidence for ALL tasks. They can do this by using the *Candidate Checklist* as a contents page inserting references/page numbers in the boxes provided.
- 5.2 Centres may wish to discourage candidates from excessive use of plastic wallets for presentation of their evidence as this may hinder the assessment process. Instead centres may wish to encourage candidates to present their work so that it is easily accessible, eg spiral bound, stapled booklet, treasury tag.

#### **6 Acceptable evidence**

- 6.1 For guidance on generation and collection of evidence please refer to the section on Assessment and Moderation in the Centre Handbook.

#### **7 Reworking the assignment**

- 7.1 If candidates do not meet the minimum PASS requirements for the assessment objectives, further work will be required.
- 7.2 Tutors may give feedback to candidates to support and guide them in producing evidence to the required standard.

# Notes For Tutors

## Introduction to the Tasks

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The tasks have been designed to enable candidates to demonstrate their knowledge and understanding of theories and practice of marketing within the travel and tourism industry.

The tasks have been designed so that all of the assessment objectives in Unit 3 are addressed.

**These guidance notes should be used in conjunction with the unit specification and Centre Handbook.**

## The Tasks

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### Task 1: The importance of marketing

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Assessment Objective 1 is assessed in this task.

This task focuses on explaining why marketing is important to **one** travel and tourism organisation.

Candidates should demonstrate their understanding of the importance to Kestrel Air of marketing Fledgling effectively. To achieve a Distinction grade, candidates will need to support their arguments with examples from successful marketing campaigns.

This task **could** be evidenced in the form of materials for an oral presentation to Kestrel Air management. Examples of presentation materials could include presentation software, OHTs, cue cards/presentations notes, and handouts.

*NB: it is not a requirement that candidates carry out the oral presentation.*

### Task 2: SWOT and PEST analyses for Kestrel Air

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Assessment Objective 2 is assessed in this task.

For this task candidates need to demonstrate an understanding of SWOT and PEST analyses. The case study, ie Kestrel Air, **must** be used for the SWOT. Tutors may wish to develop candidates' skills in SWOT and PEST analyses by using other organisations before starting the task.

Information used for the PEST should be current and industry-related. Tutors could direct candidates to key texts, market intelligence reports and relevant websites to gain this information (refer to the Resources section in the unit).

This task **could** be evidenced in the form of a series of bullet points with accompanying explanations.

### Task 3: The market segments to be targeted by Fledgling

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Assessment Objective 3 is assessed in this task.

For this task candidates need to identify and describe **TWO** potential market segments for Fledgling. Before attempting this task, candidates must be familiar with methods of segmentation.

Tutors should discuss these methods extensively and ensure that psychographic and geographic factors are covered as well as demographic and socio-economic. Tutors should encourage group discussion about what types of people use low cost airlines.

This task **could** be evidenced in the form of an information sheet.

### Task 4: Marketing research methods

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Assessment Objective 4 is assessed in this task.

This task focuses on marketing research methods. Candidates should demonstrate awareness of different methods of marketing research and should apply them to Fledgling.

Tutors should ensure that candidates are familiar with general sources of secondary information for the travel and tourism industry and should then encourage candidates to find sources that are specifically relevant to the airline sector.

Primary methods of research must not be restricted to questionnaires but should include other important methods, for example, focus groups. Candidates would benefit from carrying out research although this is not a task requirement.

This task **could** be evidenced in the form of a written report with appropriate headings and sub-headings. Candidates are not expected to produce a formal report.

### Task 5: The marketing mix for Fledgling

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Assessment Objective 5 is assessed in this task.

For this task candidates need to explain the marketing mix in general terms and to produce a plan for Fledgling that illustrates the price and promotion elements of the marketing mix.

Useful preparation for this task would include studying the marketing mix of various travel and tourism organisations. Case studies may also be used. Tutors could invite an airline representative to visit and discuss their marketing mix.

Candidates are sometimes confused by the 'place' element of the marketing mix in travel and tourism. They must understand that 'place' refers to the means of distributing the product to the final consumer and not to the destination. Thus, it includes travel agencies, direct sell and the internet.

Candidates will find airline websites useful for finding ideas on price and promotion. They could also study relevant advertising and promotion campaigns to gain ideas for the promotion mix. Before attempting to explain a pricing mix for the new brand, candidates should be familiar with the elements of the pricing mix that can be used.

This task **could** be evidenced in the form of a written report with appropriate headings and sub-headings. Candidates are not expected to produce a formal report.

# Model Assignment: Candidate Information

OCR Level 3 Nationals in Travel and Tourism

Unit 3: Marketing travel and tourism

CANDIDATE NAME: \_\_\_\_\_

# General Information for Candidates

Q *Do I have to pass this assignment?*

A Yes. You must pass this assignment to achieve the full qualification.

Q *What help will I get?*

A Your tutor will help you when completing the OCR model assignment and will make sure that you know what resources/facilities you need and are allowed to use.

Q *What if I don't understand something?*

A It is your responsibility to read the assignment carefully and make sure you understand what you need to do and what you should hand in. If you are not sure, check with your tutor.

Q *Can I copy other people's work?*

A No. The work that you produce must be your own work and you may be asked to sign a declaration to say that the work is your own. You should never copy the work of other candidates or allow others to copy your work. Any information that you use from other sources, eg books, newspapers, professional journals, the Internet, must be clearly identified and not presented as your own work.

Q *Can I work in a group?*

A Yes. However, if you work in a group at any stage you must still produce work that shows your individual contribution.

Q *How should I present my work?*

A You can present your work in a variety of ways, eg hand-written, word-processed, on video. However, what you choose should be appropriate to the task(s). For some work, eg presentations, coaching sessions, role-play, work experience, you will need to provide proof that you completed the task(s). A witness statement or observation sheet could be used for this. If you are unsure, check with your tutor.

Q *When I have finished, what do I need to hand in?*

A You need to hand in the work that you have completed for each task. Do not include any draft work or handouts unless these are asked for. When you hand in your work make sure that it is labelled, titled and in the correct order for assessing.

Q *How will my work be assessed?*

A Your work will be marked by an assessor in your centre. The assessor will mark the work using the assessment objectives and the grade descriptors in the qualification specification.

# Case study

## Kestrel Air

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Established in 1959, Kestrel Air is one of the UK's largest full service scheduled airlines. It operates over 2000 flights per week from bases at Heathrow, Gatwick, Manchester and Birmingham. The airline would like to expand operations from Heathrow but slots are very expensive and difficult to acquire. In addition Kestrel Air has failed to gain permission to operate on the lucrative Heathrow/US routes because of a restriction arising from the Bermuda 2 treaty.

### Ownership

Kestrel Air is a PLC and ownership is distributed as follows:

- Kestrel Air family                      51%
- Prince Sharid of Dubai                12%
- Germanicair                                22%
- Ordinary shares                          15%.

Germanicair is an ailing airline with substantial debts and is likely to sell its shares.

Kestrel Air will have to find additional funds for the new investment required by their expansion plans.

### Routes

London airports serve the UK destinations of Edinburgh, Glasgow and Belfast. Major European cities and resorts are served from London Heathrow, Gatwick, Manchester and Birmingham. Heathrow serves the cities of Dublin, Paris, Madrid and Milan and the resorts of Alicante, Palma, Malaga, Naples and Nice. In addition there are several domestic routes from Heathrow. No eastern European routes are operated as yet.

Long haul routes operate from Birmingham and Manchester to Chicago and Las Vegas in the US and to the Caribbean islands of St Lucia and Barbados. The Caribbean routes are new and are selling well. Very few short haul routes are operated from Birmingham and Manchester. There are flights from Birmingham to Malaga and Alicante and from Manchester to Palma and Ibiza. There are also flights to Heathrow from Birmingham and Manchester.

Kestrel Air is considering becoming a member of Star Alliance, a global airline alliance, to increase its route offering through code sharing and partnership with other airlines but the management is still unclear about the benefits.

### Employees

Almost 5000 employees work for Kestrel Air. They are based in head office and in the regional bases. Head office is situated near Gatwick, which is convenient but expensive in rents and rates. Employment opportunities are varied and include marketing, finance, customer services, operations, reservations, engineering, air crew, ground crew and baggage handlers.

The turnover of air cabin crew is high. Management is concerned about this but has no idea what the problem is. Training for cabin crew is constant in order to keep enough people trained. Each course lasts for four weeks and cabin crew fund this period themselves. They also pay for their uniform. Cabin crew often have to be ferried between bases to service different flights as they are needed.

The problems of turnover of cabin crew have created some bad press locally and exacerbated the problem of recruitment. Kestrel Air is aware that action is needed to improve its image in the locality and is considering new measures including sponsorship and developing a relationship with educational establishments.

Pilots are well paid and tend to stay. However, they are only qualified (type rated) to fly particular aircraft and there are no pilots who can fly all the different aircraft in the company fleet.

The airline employs its own ground crew and baggage handlers and finds it difficult to recruit enough people especially in London airports. Kestrel Air may decide to contract out these services but is concerned about losing control over the ground handling services.

### The fleet

There are many different types of aircraft in the fleet.

- 4 Airbus A330                    passenger capacity    244
- 9 Airbus A320                   passenger capacity    156
- 2 Fokker 100                    passenger capacity    106
- 16 Embraer 145                passenger capacity    49.

The capacity of each aircraft is different so it is not possible to switch aircraft from route to route. Many airlines consolidate the type of aircraft in order to save on operating and engineering costs. Kestrel Air hopes to do this in the future to cut back operating costs and cut pilot training costs. Half of the Airbus and Embraer fleet has been bought new in 2002. Whilst this is good for passenger confidence, it has been a major expense.

### Revenue

Year	2001	2002	2003	2004
Turnover	1421m	1432m	1421m	1435m
Profit/Loss	13.9m	14.1m	(9.8m)	(5.4m)

Passenger growth was up 16% from 2003 to 2004 with over 8 million passengers per year carried.

### Awards won

- Business Airline 2002: *What Airline?*
- Best European Carrier: *Passenger News*
- Top Airline Cuisine 2003: *The Flying Chef (Sunday Times column)*

### Distribution

Kestrel Air uses travel agents to sell its products. It also has its own reservations department at head office and a website where customers are able to book online.

### New features

- Participates in the Pet Travel scheme
- Telemedicine service on all flights
- Laptop plug in and telephone service in business class
- Self check in at Heathrow and Gatwick

### **New low cost subsidiary airline**

Kestrel Air has decided to set up a low cost subsidiary. The airline will be based at Birmingham airport and will be called Fledgling. Flights will serve major European cities and resorts including:

- Amsterdam
- Edinburgh
- Glasgow Prestwick
- Jersey
- Malaga
- Nice
- Palma
- Paris Charles de Gaulle.

It is hoped that the airline will carry over 700,000 passengers in its first year. The venture will require a huge investment and at least additional three aircraft will be needed for set up. These aircraft will all be new Boeing 737s and any future purchases will also be Boeing 737s, although the Kestrel Air fleet will concentrate on Airbus and Embraer aircraft. A marketing consultancy was employed to study the proposed Fledgling venture. Kestrel Air management spent £750,000 on this research and was very disappointed with the results. In spite of this, they have approached another consultancy *Travel Marketing – that's us* for further research. The original consultants had suggested that there was too much competition in the low cost sector at the moment and that Kestrel Air should carry out further research before committing themselves. In fact there are two low cost airlines already operating from the Midlands.

Travel agents will not be used to sell flights on Fledgling as the commission would be too costly. It is expected that more than 90% of sales will be made online at a discounted price. There will be a small team of reservation staff based at Kestrel Air's current reservation department for the remaining bookings. There is some resentment from the reservations staff at the proposal they should handle Fledgling calls in addition to Kestrel Air calls.

You have just completed your OCR Level 3 National Travel and Tourism qualification and have gained a position as a junior assistant at *Travel Marketing – that's us*. You are involved in gathering information to present to Kestrel Air management. Your role is significant as Kestrel Air has already rejected one consultancy and your company wants to keep the business. It is also an opportunity for you to prove what you can do.

# Tasks

## Task 1: The importance of marketing

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### Assessment Objective 1

Launching a new airline will be a very expensive and time-consuming exercise for Kestrel Air. The company will not be prepared to commit resources to launch Fledgling unless the project can be marketed profitably. Kestrel Air management needs to be persuaded that marketing is crucial to the success of Fledgling.

**Your task is to explain why marketing is important to Fledgling.**

The evidence for this task **could** be provided in the form of materials for an oral presentation to Kestrel Air management.

## Task 2: SWOT and PEST analyses for Kestrel Air

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### Assessment Objective 2

Before making a decision about developing Fledgling, Kestrel Air needs more information about its current position in the marketing environment.

**Your task is to produce:**

- a SWOT analysis for Kestrel Air using the case study provided
- a PEST analysis for Kestrel Air.

Your SWOT and PEST analyses **could** be presented as a series of bullet points with accompanying explanations.

## Task 3: The market segments to be targeted by Fledgling

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### Assessment Objective 3

A description of the market segments to be targeted for Fledgling is required. This will be needed in order to plan a suitable marketing campaign and to ensure advertising is effectively directed.

**Your task is to identify and describe TWO potential market segments for Fledgling.**

Your information should include:

- demographic
- socio-economic
- geographic, and
- psychographic methods of segmentation.

The evidence for this task **could** be provided in the form of an information sheet.

## Task 4: Marketing research methods

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### Assessment Objective 4

*Travel marketing – that's us* will carry out extensive research before the launch of Fledgling to ensure that it is marketed correctly and to maximise the chances of success.

**Your task is to explain marketing research methods that might be used to determine customer needs and expectations for Fledgling.**

Consider:

- both primary and secondary research methods
- quantitative and qualitative data
- the importance of on-going evaluation and analysis
- examples of current marketing research practice.

The evidence for this task **could** be provided in the form of a written report.

## Task 5: The marketing mix for Fledgling

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### Assessment Objective 5

The Kestrel Air management team will expect to receive details of the marketing mix for Fledgling. You have been asked to prepare some of these details.

**Your task is to explain the marketing mix in general terms and to produce a plan for Fledgling that illustrates the price and promotion elements of the marketing mix.**

Your information should include:

- an explanation of the four Ps, in general terms
- price mix for Fledgling
- promotion mix for Fledgling.

The evidence for this task **could** be provided in the form of a written report.

# Model Assignment: Candidate Checklist

OCR Level 3 Nationals in Travel and Tourism

Unit 3: Marketing travel and tourism

CANDIDATE NAME: \_\_\_\_\_

<b>For task 1 (AO1) have you:</b>	Completed (✓)
explained why marketing is important to Fledgling?	
<b>Evidence provided (please ✓):</b>	Ref/Page no(s)
<input type="checkbox"/> materials for an oral presentation to Kestrel Air management	
<input type="checkbox"/> or other (please give details) _____	

<b>For task 2 (AO2) have you:</b>	Completed (✓)
produced:	
<ul style="list-style-type: none"> <li>• a SWOT analysis for Kestrel Air using the case study provided</li> <li>• a PEST analysis for Kestrel Air?</li> </ul>	
<b>Evidence provided (please ✓):</b>	Ref/Page no(s)
<input type="checkbox"/> a series of bullet points with accompanying explanations	
<input type="checkbox"/> or other (please give details) _____	

<b>For task 3 (AO3) have you:</b>	Completed (✓)
identified and described <b>TWO</b> potential market segments for Fledgling? Your information should include:	
<ul style="list-style-type: none"> <li>• demographic</li> <li>• socio-economic</li> <li>• geographic, and</li> <li>• psychographic methods of segmentation.</li> </ul>	
<b>Evidence provided (please ✓):</b>	Ref/Page no(s)
<input type="checkbox"/> an information sheet	
<input type="checkbox"/> or other (please give details) _____	

(continued overleaf)

<b>For task 4 (AO4) have you:</b>	Completed (✓)
<ul style="list-style-type: none"> <li>explained marketing research methods that might be used to determine customer needs and expectations for Fledgling?</li> </ul>	
<b>Evidence provided (please ✓):</b>	Ref/Page no(s)
<input type="checkbox"/> a written report	
<input type="checkbox"/> or other (please give details) _____	

<b>For task 5 (AO5) have you:</b>	Completed (✓)
<ul style="list-style-type: none"> <li>explained the marketing mix in general terms, and produced a plan for Fledgling that illustrates the</li> <li>price mix for Fledgling</li> <li>promotion mix for Fledgling?</li> </ul>	
<b>Evidence provided (please ✓):</b>	Ref/Page no(s)
<input type="checkbox"/> a written report	
<input type="checkbox"/> or other (please give details) _____	