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Tourism and Hospitality Training Academy

Summary Report

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Tourism and Hospitality Training Academy: Summary
Report

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Miller Research (UK) Ltd.



For further information please contact:

Jenny McConnell

jenny@miller-research.co.uk

Pen-y-Wyrlod, Llanvetherine, Abergavenny, Monmouthshire, NP7 8RG, UK

www.miller-research.co.uk | 01873 851880 | Twitter: @miller_research

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1. Background

Introduction

1.1 Miller Research was appointed by Bluestone Resorts Ltd to outline the context and vision for a new tourism and hospitality training academy in West Wales. The research had two aims. The first was to generate an evidence base that establishes the context in which a potential academy would be delivered. The second was to stimulate thinking and shape ideas around what an academy could comprise. The recommendations are based on several key drivers identified by the research:

- Welsh Government policy emphasis on wellbeing and sustainability
- Consumer demand for eco-tourism and experiential travel
- Regional assets of landscapes, coast and a distinct identity
- Barriers and enablers to recruitment and career progression

Approach

1.2 The approach for this research consisted of two phases, reflecting the different objectives of the study. The first part of the study comprised stakeholder and sector engagement, via twelve interviews and an interactive half-day workshop. This was followed by a desk-based review to understand the barriers that people face in entering the tourism industry, and issues that businesses face in retaining staff.

1.3 The second phase of the research comprised further desk research with a focus on global and Welsh trends driving growth and decline within the tourism industry. Furthermore, case studies were identified to highlight best practice in seeking to address the challenges facing the sector, highlighted in the previous research stages.

Structure

1.4 The structure of this summary report follows the approach taken above. Firstly, an overview of global and Welsh trends in the tourism industry are presented. The second section provides an overview of existing education and gaps in the industry. The third part covers barriers and enablers to taking up a career in the industry. The fourth section of the report covers

existing training provision, and provides a discussion of innovation and best practice, drawing from case studies. The report closes with suggested options for the Academy.

2. Overview

- 2.1 The research is predicated on a need identified across the industry in West Wales to attract and retain quality staff in the tourism sector (spanning hospitality, attractions outdoor activity tourism and aspects of retail). Consultations with sector representatives suggest that the industry (with some notable exceptions) suffers from a vicious circle of low wages, unsocial / variable hours and limited career progression opportunities leading to a lack of high quality new entrants and leakage of talent to other sectors or to “hotspots” such as London and Bristol.
- 2.2 Industry stakeholders also observed that for tourism in the region (and Wales) to compete effectively it needs to focus on a strong set of values linked to its unique proposition – based around individuality, culture, landscape, regional produce and unforgettable experiences.
- 2.3 Those taking part in the research reported that many recruits were attracted to the area by the same factors that appeal to visitors – with returners to Wales seeking high quality lifestyles and safe, friendly communities to bring up families or to downsize and release equity. University and gap year students were identified as a vital source of skills, especially around customer service and social media activities, attracted by the ability to combine working in tourism with outdoor experiences such as surfing or mountain biking. Hence the research identifies a need to reshape the industry itself to embrace the needs of these groups – promoting lifestyle opportunities, accepting the characteristics of a millennial workforce and promoting West Wales as a sustainable gap year destination to attract young talent
- 2.4 The report builds the case that current training provision is out of step with the needs and characteristics of the sector in the region. Stakeholders identified attitudinal skills such as employability, team working, good communication and digital skills as critical, along with a thorough

understanding of culture, provenance and craft food skills to equip staff with the ability to convey the backstory of the region to customers and hence deliver excellent, engaging customer service. Hence we have argued the vision for a radical tourism academy which complements existing training provision by:

- Focusing on bespoke courses for key employment groups, whilst providing CPD for the existing workforce to build cultural awareness
- Providing a range of delivery vehicles, with an iconic physical location at the core, supplemented by online and distributed training with supply chain businesses
- Offering a scalable model, which could be replicated to create a network across Wales

2.5 This summary report is intended to be read in conjunction with earlier reports which build the vision, lay out extensive case study examples and offer deeper insights into the issues than can be provided here.

3. Tourism Sector Trends

Global Trends

3.1 The global tourism and hospitality is expected to experience **continued growth**. The World Travel and Tourism Council, for example, calculates that the total direct contribution of travel and tourism to GDP will rise from approximately \$2,570bn in 2017, through to \$3,890bn in 2028.¹ This means a growth from 3.2 per cent of global GDP, to 3.6 per cent.² The global growth of this sector has been attributed to a number of factors – primarily the rise of consumer purchasing power, alongside the resilience of the sector in otherwise unstable economies.

¹ World Travel and Tourism Council (2018) Travel and Tourism Economic Impact 2018 World [https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/world2018.pdf]

² World Travel and Tourism Council (2018) Travel and Tourism Economic Impact 2018 World [https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/world2018.pdf]

- 3.2 The **demographics** of tourism consumers are changing, due to ageing populations and low fertility rates.^{3,4} While this places a risk for all sectors (including tourism) in terms of access to labour, the tourism and hospitality sector is well positioned to grow, benefiting from the high purchasing power of older people and the potential to develop accessible leisure experiences targeted towards this group.⁵
- 3.3 Developments in **technology** are expected to change the industry. Using ‘big data’, companies are now able to run campaigns aiming to influence different demographics.⁶ The power of virtual reality is additionally being harnessed by tourism companies to communicate experiences to potential customers – such as immersive experiences, or VR hotel rooms.⁷ The sharing of content via digital platforms is also likely to increase the popularity of less-well known destinations as visitors crave ‘unique’ experiences.
- 3.4 The moves towards more **sustainable tourism practices** is driven as “a low carbon lifestyle has been valued all over the world.”⁸ ‘Green’, ‘sustainable’, or ‘low carbon’ tourism each have varying, and competing definitions but generally relate to activities that account for long term future environmental and social impacts – rather than primarily financial return.⁹ Alongside a change in consumer behaviour (where visitors may look to minimise their carbon footprint), experiences that offer visitors the

³ United Nations (2017) World Population Aging

[http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2017_Highlights.pdf]

⁴ *Ibid.*

⁵ OECD (2018) OECD Tourism Trends and Policies 2018 [https://www.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-tourism-trends-and-policies-2018_tour-2018-en?itemId=/content/publication/tour-2018-en&_csp_=158344badc45e18456f7f4f7c319f647&itemIGO=oecd&itemContentType=book]

⁶ Enrique de la Madrid Cordero (2017) Do More with Less: The Power of Innovation & Technology, in WEF (2017) The Travel and Tourism Competitiveness Report [http://www3.weforum.org/docs/WEF_TTCR_2017_web_0401.pdf]

⁷ OECD (2018) OECD Tourism Trends and Policies 2018 [https://www.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-tourism-trends-and-policies-2018_tour-2018-en?itemId=/content/publication/tour-2018-en&_csp_=158344badc45e18456f7f4f7c319f647&itemIGO=oecd&itemContentType=book]

⁸ Yang, Y. (2015) Implementation Strategies of Low Carbon Tourism

[<https://pdfs.semanticscholar.org/c3ae/cc8c18d209c9dc2cb026d4ed0f6fce2a36cd.pdf>]

⁹ UNWTO and UNEP (2012) Tourism in the Green Economy: Background Report

[<https://www.cbd.int/financial/doc/tourism-greeneconomy.pdf>]

opportunity to interact with the natural environment are growing in popularity.¹⁰

- 3.5 Driven by both social media and sustainability, '**experiential travel**' has been a prominent buzzword in the last few years, as visitors demand more unique experiences that may play to a more individual narrative¹¹. Trekksoft highlights “a request for unique experiences” as the number one trend for 2019, as visitors (particularly Millennials) want to share a “once-in-a-life-time” experience.¹² Other descriptions of this trend use language such as “meaningful experiences”, or “life fulfilling”.¹³

Wales

Trends

- 3.6 As stated by UNEP and UNWTO “**rural and community tourism** are... expected to grow most rapidly over the next two decades.”¹⁴. This is a trend that Wales has been able to capitalise upon and to be regarded as a leader. Nationally, Wales has a number of policies aiming to increase its environmental credentials across all sectors (see below). Brand Wales and the latest ‘teaser’ advertisement from Surf Snowdonia are demonstrative of this aesthetic, often associated with **outdoor pursuits** in Wales – they depict a range of adventure sports, coastlines, camping and predominantly young people.¹⁵
- 3.7 An oft-cited advantage of Wales’ tourism offer is that it “has more castles per square mile than any other country in Europe”.¹⁶ There are a total of 600 castles in Wales. The 2016 Welsh Government strategy “Light Springs through the Dark: A Vision for Culture in Wales” highlights **cultural**

¹⁰ TrekkSoft (2018) Travel Trends Report 2018

¹¹ See, for example, recent expansion of tourism to Chernobyl. <https://www.chernobyl-tour.com/english/>

¹² Trekksoft (2018) Travel Trends Report 2019

¹³ Swift Team and Peak Adventure Travel Group (2014) The Rise of Experiential Travel

¹⁴ UNWTO and UNEP (2012) Tourism in the Green Economy: Background Report [<https://www.cbd.int/financial/doc/tourism-greeneconomy.pdf>]

¹⁵ Surf Snowdonia (2018) Our New Brand for 2019 – Adventure Parc Snowdonia [<https://youtu.be/SVCwyeJgCMA>]; Visit Wales (2019) Brand Wales [<https://www.visitwales.com/>]

¹⁶ Visit Wales (2019) Is Wales the Castle Capital of the World? [<https://www.visitwales.com/things-to-do/attractions/castles-heritage/is-wales-the-castle-capital-of-the-world>]

attractions as generating significant economic contribution to tourism in Wales – stating that £150million a year is spent on culture and heritage-based stays in Wales.¹⁷ Furthermore, the Welsh Language is often used to add to ‘authentic values’ to tourist attractions, as “Europe’s oldest living language.”¹⁸

Policy

- 3.8 The Wellbeing of Future Generations Act and The Environment Act demonstrate that **environmental sustainability** – from biodiversity through to waste management and energy efficiency – is a priority for Welsh Government. Importantly, by continuing to develop and protect Wales’ reputation for its natural assets (e.g. landscapes) the tourism sector with the right skills can deliver these agendas.
- 3.9 Welsh Government policy additionally places tourism as an important means to deliver **economic growth**. Tourism in Wales contributes £3.1 billion per annum of GVA, and a total economic contribution of £6.9 billion – 13.9 per cent of the total economy.¹⁹ Prosperity for All commits Welsh Government to delivering support to businesses, especially given the risk that Brexit poses. The Strategy for Tourism 2013-2020 outlines a number of ambitions to growth, focusing on customer care, demand-led skills, specialist skills, and changing perceptions of the sector.
- 3.10 Although the outcomes of the UK’s withdrawal from the European Union are currently unknown, **Brexit** is likely to result in restrictions to freedom of movement, changes to supply chains, loss of EU funds to Wales, and ongoing ‘readiness preparations’ over the near future. It may have a substantial effect on access to staff: approximately 1 in 20 workers in the sector are from the EU, and two thirds of the 24 medium / large hotel chains are now concerned about future employment as a result of Brexit.²⁰

¹⁷ Welsh Government (2016) Light Springs Through the Dark: A Vision for Culture in Wales

[<http://www.wales.nhs.uk/sitesplus/documents/861/161213-a-vision-for-culture-in-wales-en.pdf>]

¹⁸ Coupland, N. (2012) Bilingualism on display: The framing of Welsh and English in public spaces [<https://orca.cf.ac.uk/36596/1/Coupland%202012.pdf>]

¹⁹ Wales Tourism Alliance (2018) WTA Policy [<https://www.wta.org.uk/wta-policy.html>]

²⁰ TripAdvisor (2018) 2018 Hospitality Sector Report. Deputy (2018) Retaining Britain’s Hospitality Workers: How the UK can avoid a crisis in the hospitality sector

4. Tourism and Hospitality as a Career

4.1 This section of the report considers the different enablers and barriers to entering employment in the tourism and hospitality. 'Enablers' considers existing contextual aspects of the tourism that may appeal to individuals, whereas 'barriers' considers issues that may need to be overcome.

Enablers

4.2 Tourism and hospitality is one of the most competitive and innovative sectors in the economy, fuelled by the competition between countries and regions to attract visitors. According to the World Travel and Tourism Council (WTTC), in 2017 travel and tourism GDP made up 10.4 per cent of global GDP whilst direct travel and tourism GDP growth in 2017 was 4.6%, outpacing the global economy for the seventh successive year²¹. In terms of what this means for employment, in 2018, **one in ten jobs globally** were supported by the travel and tourism industry whilst one in five of all jobs created worldwide in the last decade have been in travel and tourism.

4.3 Alongside growth, the relative **flexibility** of working in the sector (in contrast to a traditional 9-5 job) may enable people to work in the sector. Whilst some of this flexibility comes from the needs of the sector itself – i.e.: to operate 24 hours a day, seven days a week - there are growing numbers of employers who are prioritising a good work-life balance in order to support staff wellbeing and maximise staff retention.

4.4 Tourism is a **global industry** and many of the skills learnt in working in tourism in one country can be transferred to jobs all over the world, enabling those working in the sector to experience new cultures and environments. Jobs in the sector that offer **opportunities to travel** include event coordinators, international tour guides, cruise ship crew members and flight attendants. A benefits of the Marriott Hotel qualifications scheme, for

[<https://cdn2.hubspot.net/hubfs/3040938/LP%20Assets%20UK%20Retention%20Report/Deputy-UK%20Staff%20Retention%20Report%202018-Retaining%20Britain%27s%20Hospitality%20Workers.pdf>]

²¹ World Travel and Tourism Council, Travel and Tourism Economic Impact (2018), -

[<https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/world2018.pdf>]

example, is that students can work globally within the franchise (depending on visa requirements, language skills and rights to work abroad).

- 4.5 The **location** of many tourism jobs may also appeal. Traditionally many young people in particular have been drawn to working in ski resorts, enjoying a combination of outdoor activities and vibrant social life alongside day to day employment. Stakeholders identified that there are advantages of working in the sector in Wales in particular, including comparatively low house prices and cost of living, high quality of life for families, the proximity to natural assets including the coastline and countryside, potential to engage in outdoor sports and the health benefits of living in a rural area compared to a city.

Barriers

- 4.6 The tourism and hospitality industry is widely perceived as offering **low wages**, borne out in some statistics on pay levels in the sector. A Statista study of UK employees in the tourism and hospitality industry involved the analysis of hourly wages within 18 sub-sectors of the industry²². As of 2017, the six sub-sectors with the lowest part-time average wage were; hotels and similar accommodation (£8.17), camping grounds and recreational vehicle parks (£7.77), food and beverage serving activities (£7.82), restaurants and mobile foods (£7.73), beverage serving activities (£7.71) and amusement & recreation (£7.29).
- 4.7 Due to the 24/7 nature of many elements of the tourism and hospitality industry, conventional nine to five working hours may not be available for many employees. Bar staff often work long evenings, chefs may be required at breakfast, lunch and dinner and hotel concierges are required throughout the night at hotels. These **non-traditional working hours** of the sector may not appeal to those with other commitments (e.g. childcare).
- 4.8 YouGov and Deputy analysed the hospitality industry and asked how it could better retain workers within the sector. Forty-two per cent stated that better

²² Statista (2017) Mean hourly pay in tourism and hospitality industries in the UK in 2017 [https://www.statista.com/statistics/637600/tourism-and-hospitality-average-hourly-pay-united-kingdom-uk/]

career prospects would make employees less likely to leave the industry.

The most commonly cited factors that would make employees less likely to leave the industry were: better pay and benefits (63 per cent), more control over work life and shift patterns (55 per cent) and stable income and/or guaranteed hours (52 per cent).²³

5. Existing Training Provision

- 5.1 To ensure that a future Tourism and Hospitality Academy for Wales reflects the needs of the sector, it is important to consider existing delivery of training, and any gaps that need to be addressed.

Formal Education

- 5.2 Tourism and hospitality courses are currently offered at 17 universities and colleges in Wales. There are 177 courses related to the tourism and hospitality industry (including some variations) currently advertised in prospectuses and on the websites of these institutions. More than 80 per cent of the courses are offered at further education (FE) institutions (153) with less than fifteen per cent offered at higher education (HE) institutions (24).²⁴ Notably, only three tourism and hospitality courses in Wales are delivered online, all in FE; namely Level 2 air cabin crew diploma, Level 2 holiday rep diploma and travel and a non-accredited tourism diploma. Interviews and desk based research suggested a shortage in out-of-work provision of training in specialist courses. Key examples included events and outdoor adventure tourism.
- 5.3 In terms of **qualifications**, HE institutions focus on degree level qualifications upon completion of the course (24 courses, Level 4+). In FE, the offer is more varied, and courses range from casual, unaccredited learning to foundation degrees. The highest proportion of available qualifications are at Level 2 (48 courses).²⁵ Formal, industry recognised qualifications (from an academic certificate, through to basic requirements to work in any given position) are an important element of course offers across

²³ *Ibid.*

²⁴ This information has been obtained from an extensive internet search and stakeholder interviews.

²⁵ Miller Research, adapted from Welsh HE / FE institutions prospectuses and websites

the sector as a means to gain formal recognition, and provide students with something they feel has prestige.

In Work Training Provision

- 5.4 There are a number of Foundation Apprenticeships, Apprenticeships and Higher Apprenticeships delivered in Wales in the tourism and hospitality sectors in the previous six years. They are grouped into 'leisure, sport and travel' and 'hospitality'. Whilst hospitality has remained relatively stable in terms of numbers of apprentices (between 2,195²⁶ and 2,915²⁷) there has been a steady, almost year-on-year increase in the numbers on leisure, sport and travel programmes, rising from 885 in 2012/3 to 2,210 in 2017/8.
- 5.5 There are also more generic in-work training opportunities, which are relevant to the tourism and hospitality sector. For example, Skills for Industry 2, funded through the European Social Fund provides subsidised, sector-specific, work relevant training and advice to businesses in south west Wales in a range of sectors including food and tourism. Other opportunities include Work Welsh (Cymreag Gwaith), and the Welsh Union Learning Fund.
- 5.6 Case studies and existing courses demonstrate that in-work placements are valuable for both employers and students – and can often be as significant as formal qualifications in terms of prestige. Work placements which provide a rotation of roles across an entire business or organisation allow students to fully understand how sub-sectors (e.g. culinary careers) can impact a wider business.

Mentoring and Coaching Opportunities

- 5.7 In addition to the formal and accredited college provision summarised above, there are programmes and initiatives offering training and skills development of relevance to the tourism and hospitality sector. From elite management courses (e.g. Hotel ICON), to those targeting vulnerable individuals to provide a sustainable career (Hotel School, London) access to networks and

²⁶ In 2015/6. - StatsWales

²⁷ In 2013/4. - StatsWales

coaching is advertised as a primary element of career readiness as part of the course.

Virtual Learning Environments

5.8 Educational delivery methods have become increasingly diverse as educational training attempts to create a dynamic learning environment that better engages learners.

- A **content and supply model** utilises online content, interacting with course leaders and stimulating discussion. The THINK institute in Amsterdam follows this approach, to provide creative leadership development, with a mix of a physical school and online materials.
- A **blended model** uses centrally held materials incorporated with use of online discussion and collaborative activities. Virtual College follows this approach. sers undergo online training courses for individual training, skill development, and formal qualifications.
- A **massive open online course** relies solely on online learning. It allows for online communication, collaborative online working and access to a database of resources.
- **Mobile applications** are increasingly being used for training. Some mimic the structure of video games to engage learners (e.g. a reward system and public leader boards). Examples include the Duolingo language learning platform.
- **Online content platforms** can provide many short training videos and course material to a large number of people in an accessible way. Typsy, for example, specialises in providing online video training hosted by hospitality instructors from all over the world.
- **Virtual reality** provides an immersive environment, to undergo practical forms of training that provide a more realistic training experience for a worker. Hilton Hotels²⁸ use VR training so their corporate hotel employees can understand day to day operations.

5.9 Lessons can be learnt from the existing delivery of **virtual learning platforms in Wales**. The Do Lectures, for example, is an annual event

²⁸ <https://www.instituteofhospitality.org/virtual-reality-gets-real-for-hospitality/>

hosted in Cardigan in West Wales in 2008. By broadcasting lectures via the internet, Do Lectures hope to inspire a large number of people with viewers from 201 different countries and an audience of between 500,000-1,000,000 people. Alternatively, the **Go North Wales Tourism and Hospitality Academy** has launched a virtual academy with a web portal showing job opportunities, and for connecting students to work experience opportunities.

Implications

- 5.10 Whilst there is a wide range of training for the sector as outlined above, sector interviews make it clear that this is far from targeted at the bespoke needs of the sector in West Wales and does little to sell the backstory of the region in terms of landscape, history or culture. For existing businesses, there is support for developing cultural identity and local supply chains (RDP projects such as Food Skills Cymru); however, what is available in the mainstream education sector tends to be more conventional; catering apprenticeships based around French cuisine, generic customer service training and inadequate emphasis on the importance of provenance and sourcing local produce.
- 5.11 Training is also said to be quite siloed; courses are available in 'leisure and tourism' or 'hospitality and catering', whilst there is nothing to prepare students more holistically in terms of utilising the local culture and physical landscape in order to develop awareness of craft food skills, skills to act as ambassadors for the region, knowledge of the backstory or the propensity to develop innovative and unique tourism businesses.
- 5.12 Linked to this is the need for applied or bespoke customer service training that provides people with the skills to personalise the service they provide to customers and guests, to promote cultural assets and to think laterally in providing a service. There is also a marked gap in training in adventure tourism and outdoor activities (outside of HE), which would be highly relevant to west Wales. There is an identified desire for training that is responsive to current trends and issues in tourism, as well as skills development in cultural understanding, preparation of fresh, locally sourced and high-quality products and sustainable practice in business management.

- 5.13 The delivery method for most of the existing training in the sector is traditional, classroom based and leading to a formal qualification and there is very little online training available. In order to appeal to a younger and diverse future workforce, who are looking for fulfilment and adventure, training needs to be innovative, fast-paced and varied.

6. Options: A Sustainable Tourism Academy

Rationale

- 6.1 There is significant tourism development activity in Wales at present, much of it focused on the outdoor activity sector. The importance of entrepreneurship is also emphasised – both for those operating businesses and for employees. There is a continuing trend towards short breaks focused around activities and drawn towards coastal areas. Enlightened employers recognise the need for a culture change to being more supportive of employees to build retention. It was also recognised that the millennial workforce is often transitory and to use that to the industry's advantage. There are many examples of innovative, flexible approaches to learning in tourism and other sectors, which could provide a baseline for developing a novel approach based around sustainable working.
- 6.2 We have drawn together a set of **core values** which will both define the nature and underpin the culture of the Academy. We suggest that these should encompass the following: distinctive, flexible, global, networked, immersive, innovative, inspirational, rooted, and sustainable.
- 6.3 Through research into best practice and industry interviews, we suggest there are three main options for the **delivery structure** for the Academy:
- A physical establishment: This would be the gold standard for an Academy, providing an iconic focus for the industry to encounter best practice, to use as a sector resource, to collaborate and create a community learning space.
 - Networked delivery: This would be a lower-cost approach, using existing facilities as teaching and learning spaces.

- A virtual Academy. This would be the lowest cost approach, presenting shared content to subscribers online.

Target Audience

- 6.4 **Millennials** are those born between 1981 and 1996, while **Generation Z** comprise those born between 1997 and 2010. They often crave 'meaningful experiences', prioritise social and economic responsibility, often thrive in collaborative environments, and are 'digital natives'.
- 6.5 Another group are '**older staff and city returners**'. This group comprise those who may be looking for a new career due to a change in life circumstances, such as bringing up a family, health, or disillusionment with their current industry. Alternatively, they may be early retired, bringing high levels of skill, with some wanting to work to pay the bills or to keep busy rather than focusing on developing a career progression.
- 6.6 The **existing workforce** could be any age or skills level. However, if employers are to compete and respond to the challenge of delivering a values-based sector for the industry in South West Wales, it will be important to continuously upskill staff to embrace new thinking in the industry.
- 6.7 Existing training providers suggested that **disengaged learners** are frequently steered onto tourism and hospitality courses as a last resort, impacting on the perceptions of such courses and consequently on attitudes towards careers in tourism as a whole. There may be an opportunity to devise experiential learning for this group in a real workplace setting, to inspire and motivate at-risk individuals for a career in tourism.

Training and Learning Options

- 6.8 This report has highlighted a number of key trends in employment and growth for the tourism industry, but globally and in Wales. Important factors that the Academy must therefore include, are:
- The natural assets of Wales, such as the coastline and access to adventure sports
 - The ability to innovate in the space of sustainable and eco- tourism

- The potential to deliver against the wellbeing goals through sustainable employment opportunities
- Providing training courses tailored to different population segmentations, and skillsets
- The appeal of experiential learning to younger generations and the existing work force

We also consider it essential that the academy provides a mix of specialist modules with the ability for learners to draw on these in bespoke manner, to devise their own experiences and outcomes.

- 6.9 For an **entry level course**, a future academy could recruit school leavers and those looking for a career change to the sector by offering an entry level course of training. A qualification awarded after pursuing such a course would recognise the acquisition, by students, of the basic knowledge and skills to apply them to the practicalities of work within the tourism and hospitality sector. Such a course would allow the academy to overcome the barriers of recruiting new employees
- 6.10 An **elite entrepreneurship** course within the academy could help contribute to shifting the perception of the tourism and hospitality sector as offering no career progression, being low-skilled, and low paid. Recruiting those who already have a high level of experience working within the sector and developing their skills would encourage staff retainment within the existing workforce by better improving career prospects. The prestige associated with undertaking such a course would have the potential to create a network of elite workers operating within the tourism and hospitality sector.
- 6.11 The tourism and hospitality sector relies heavily on young workers who are difficult to retain. A **'gap-year course'** offered specifically for those who intend to leave the sector after a short period of employment would allow the industry to embrace the issue of retention of the workforce rather than suffer with it. A short, intense course for such a demographic would allow workers to operate to the industry's short term needs as well as shifting perceptions for those who may continue to work within the sector long-term.

- 6.12 The aim of an **in-work training** course would be to provide employers the opportunity up-skill their existing workforce by sending their staff on a training courses that is specifically tailored to the operation of their business. For example, content could be about local sourcing and how to market Welsh produce with a narrative that reflects the local area and business ethos.
- 6.13 A future academy's relevance is premised on its ability to demonstrate and **share best practice** throughout the tourism and hospitality sector. It is, therefore, imperative for the academy to host events, create a network between students, alumni, and businesses, to produce its own content to encourage interactions with industry leaders as well as to recruit participants, and utilise academy ambassadors to create a distinctive brand.
- 6.14 Suggested outline content and delivery vehicles for these courses are laid out in Appendix 1 below.

7. Conclusion and Recommendations

Conclusions

- 7.1 This report has demonstrated a continuing trend in tourism towards more experiences, a search for authenticity and desire for a distinct backstory amongst visitors. Training and development needs to reflect this; conveying a deep understanding of the region to enable excellent service.
- 7.2 Hence there is an opportunity to develop a tourism academy which reflects this; offering a range of bespoke courses and modules which meet the needs of key groups of employees, new entrants and entrepreneurs and, critically, the needs of employers in the region.
- 7.3 Whilst we believe there is a case for the development of an iconic tourism academy building to both deliver on the identified needs and to provide a focus for the industry in the region, it is vital that the form, ownership and location of this are agreed through further consultation across the sector and with partners.

Recommendations

- 7.4 That the outcomes of this short report should be discussed by stakeholders to identify priorities and preferred options going forward.

8. Annex A: List of Tourism and Hospitality Course Options

Entry Level Course

	Physical Space	Blended Learning	Virtual Course
Admissions	<p>The entry level course would be for school leavers and people with experience of work who are looking for a career change.</p> <p>It may also meet a philanthropical agenda by offering an appealing career pathway for young people who are disengaged or NEET²⁹.</p> <p>Formal qualification requirements would be minimal, although GCSE English or Welsh and maths would be essential. More critical requirements would include:</p> <ul style="list-style-type: none"> • Critical thinking and communication skills • Ability to self-manage and be a self-starter • Desire for personal and professional growth • Interpersonal skills and self-awareness. <p>Prospective candidates would be interviewed by a small panel and would also need to participate in a half day assessed group activity, to test team working and communication abilities. Experience of working in the sector would not be necessary.</p>		
Delivery	<p>The course would be delivered via a combination of classroom-based theory lessons, practical workshops and placements.</p> <p>There would be an ethos of good work-life balance, whereby students are encouraged to engage in cultural (for example music, dance and drama) and sporting (for example coasteering, horse riding, surfing and rock climbing) activities available locally.</p>	<p>Blended learning options would include a combination of online and face-to-face training.</p> <p>This would appeal to learners with other commitments and those with concerns about the carbon footprint associated with daily travel to a physical academy.</p> <p>Learners would be encouraged to communicate and collaborate on projects electronically, to ensure</p>	<p>The virtual learning would suit people who have existing work or caring responsibilities as well as opening the course up to people from all over the UK and abroad.</p> <p>Courses would be delivered through an online portal, with a series of modules that could be completed in students' own time. Learning would be delivered via recorded lectures and demonstrations from industry experts.</p>

²⁹ Not in education, employment or training.

		they are still developing team working expertise.	One-to-one support would be available through an online mentor.
Curriculum	<p>The initial part of course would cover all areas of tourism and hospitality to an elementary level including:</p> <ul style="list-style-type: none"> • Customer service • Food and drink • Local sourcing • Events management • Business management and marketing • Outdoor activities • Sustainable tourism • Culture and language <p>The curriculum would also include regular day trips out to suppliers and examples of industry best practice and opportunities for shadowing people already working in the sector.</p> <p>The second part of the course would provide an opportunity for students to specialise in areas of most interest to them. This would involve an extended period of immersive work experience and a project based around developing a hypothetical business start-up.</p>	<p>A blended learning course would also cover the following areas of tourism and hospitality to an elementary level:</p> <ul style="list-style-type: none"> • Customer service • Food and drink • Local sourcing • Events management • Business management and marketing • Outdoor activities • Sustainable tourism • Culture and language <p>Each area - or module – would involve a combination of online lectures, self-learning and research and face-to-face teaching, alongside industry visits and an extended period of work experience.</p>	<p>A virtual course would cover the same topics, but with far greater emphasis on self-learning.</p> <p>Students would still participate in an extended period of work experience during the second part of the course.</p>
Mentoring and Coaching	<p>Students would be supported to mentor each other, as a means of building camaraderie and sharing learning and experience. This would include regular one-to-one sessions and group discussions. Mentoring via Skype could also be provided by academy alumni in the future.</p>	<p>Students would be supported to mentor each other using a combination of face-to-face and Skype sessions.</p>	<p>Students would be supported to mentor each other via Skype as a way of building relationships.</p> <p>Mentoring via Skype could also be provided by academy alumni in the future.</p>

		Mentoring via Skype could also be provided by academy alumni in the future.	
Career Progression	Students would be supported to secure work in their chosen field, building on the contacts they have made during the course and via the networks available to the academy.		
Network	Students would be encouraged to remain part of the academy alumni, providing opportunities to network with each other, become mentors to future academy students and offer work experience placements.		

Elite Entrepreneurship Course

	Physical Space	Blended Learning	Virtual Course
Admissions	<p>The Elite Entrepreneurship Course would seek to recruit those who already have high levels of experience working within the sector and have potential to further develop their skills. Ideally, candidates for the course would be selected through industry recommendations – such as were a manager has noticed high levels of enthusiasm and capability from a team member. The specific entry requirements would be amended depending upon course content (e.g. for chefs as opposed to managers). Example requirements could include:</p> <ul style="list-style-type: none"> • at least two years’ experience in the sector • a referral from an industry, business or education provider • GCSEs and / or associated professional qualifications. 		
Delivery	<p>If the academy was delivered in a physical space, two-three-week short courses would be delivered during the quieter seasons for Welsh tourism.</p> <p>The courses will be based on experiential style learning. Participants will be encouraged to develop ‘projects’ related to their content area, in groups. This will be supplemented with taught elements to inform their progress. The course emphasises team working, collaboration, and innovation-based entrepreneurship.</p>	<p>Rather than delivering content in a physical space, the ‘blended learning’ option provides business-based opportunities for experiential learning.</p> <p>Academy ‘ambassadors’ will deliver training to businesses on-site and tailored according to individual business and economic needs.</p> <p>The Academy will work in partnership with businesses to deliver tailor made, yet relevant courses based on a participatory model.</p>	<p>This method of delivery will be highly flexible and delivered through an online portal.</p> <p>Taught skype ‘webinars’ will be delivered as part of this training.</p> <p>In terms of collaboration, ‘teams’ will be established via the portal. Project-based learning will be undertaken in a virtual environment.</p>
Curriculum / Content	<p>Specialised courses designed around:</p> <ul style="list-style-type: none"> • outdoor leadership • craft food • sustainability values • cultural backstory • event management 	<p>The academy will have a set of standard courses covering the subjects to the left of this cell. There would also be scope to cover business-specific issue such as:</p> <ul style="list-style-type: none"> • local sourcing • sustainable supply chains 	<p>Given the delivery method of this form of learning, it is likely that an online-based course will cover content that relies less on inter-personal activity.</p> <ul style="list-style-type: none"> • digital marketing and using ‘big data’

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	<ul style="list-style-type: none"> • understanding customer trends • digital marketing and engagement • 21st Century entrepreneurship. 	<ul style="list-style-type: none"> • developing a distinct business narrative • sector collaboration 	<ul style="list-style-type: none"> • integrating technology into sustainable business practices
Mentoring / Coaching	A network of industry experts from across the field of tourism and hospitality (from business managers through to chefs, and outdoor adventure leaders) will provide one-to-one guidance to individuals throughout the course.	Mentoring and coaching would be delivered via the Academy 'ambassadors' in conjunction with webinars delivered from industry leaders.	Mentoring would be delivered remotely via web-call, in which the participant gains sector best practice and refines ideas.
Career Progression	Not directly – prestige and networks to advance career in a soft way (promotion, or starting a new business)		
Network	It is envisaged that graduates from this course will continue to collaborate and develop projects / ideas to the betterment of the Welsh tourism industry. The academy can help cultivate an alumni network through events and sharing best practice.		

Gap Year Course

	Physical Space	Blended Learning	Virtual Course
Recruitment	<p>There would be a strong social media presence, and links with further and higher education institutions providing options of pursuing a gap year course. The course would emphasise natural assets, learning about sustainability, and the opportunities provided by the industry including seasonality (e.g. working six months in a surf beach in Pembrokeshire before doing a ski season in the Italian alps).</p> <p>The target age group would be those aged between 18 and 24, although there wouldn't be any formal age restriction. No prior experience in the industry would be necessary, but applicants would be expected to submit a short form or personal statement outlining their ambitions for their gap year. This would enable the academy to work with the students to find suitable placements upon completion of the course.</p>		
Delivery	<p>The course would last approximately 10 weeks and provide students with two-week rotations across the different aspects of the tourism industry.</p> <p>Each week, the students would attend lessons or placements between Monday to Thursday.</p> <p>The academy would link with local outdoor adventure facilities (e.g. surf schools, climbing, orienteering, kayaking) and offer students the option to undertake courses on these on Fridays and Saturdays.</p> <p>There would be a strong social element to the course, which could be delivered via:</p> <ul style="list-style-type: none"> • shared on-site accommodation • group outdoors activities (above) • social media networks • encouragement of internal group activities (e.g. shared meals with students and staff) 	<p>Blended learning options would provide some online and in-person training. This would offer a high degree of flexibility for those with employment commitments, or geographical barriers.</p> <p>The course would predominantly be delivered online – with modules delivered via video and recorded lectures.</p> <p>The course would involve a one day a week presence at the academy, to apply what they have learnt through remote learning.</p>	<p>A virtual course would be useful to those who have geographical and / or work commitments that prevents them from attending a physical location.</p> <p>Courses would be delivered through an online portal, with a series of modules. Students would be able to select the time period that they require to complete each element. Content would be delivered via:</p> <ul style="list-style-type: none"> • videos • recorded lectures • online quizzes / tests <p>One to one support would be available through a mentor, online.</p>
Curriculum	<p>There would be a number of core content modules (e.g. kitchen health and safety, customer service, and housekeeping) which would make up the first eight weeks of the course. In the final two weeks, there would be four options in which students can specialise in:</p> <ul style="list-style-type: none"> • basic culinary skills • management and leadership 	<p>The core content modules (described to the left) would be the focus of the blended learning course. They would be delivered online with one day a week at the academy to gain practical experience.</p>	<p>A virtual learning course would not provide the same level of exposure to different elements of the tourism industry but could provide online content that may be helpful for individuals. These may include:</p> <ul style="list-style-type: none"> • CV and careers modules • Kitchen health and safety • Leadership and management

	<ul style="list-style-type: none"> • social media and marketing • sustainable business practices 		<ul style="list-style-type: none"> • Virtual reality – customer service and housekeeping
Mentoring and Coaching	The aim of mentoring for this course would be to provide guidance on applications and help scope out job opportunities when travelling.	The academy would provide online content and links to advice on job applications. There would be a potential for online mentors to provide one-to-one guidance and feedback to course participants.	
Career Progression	<p>This course does not aim to fill work placements within the Welsh tourism sector but address negative perceptions of working in tourism and hospitality.</p> <p>It is envisaged that some (but not all) will continue to work in the tourism and hospitality sector long-term.</p>		
Network	<p>Rather than establishing a formal network of industry experts, there would be a strong social element to this course, and it is expected that friendships would be made that last beyond the scope of the course. For example, students may go on to travel abroad together.</p> <p>In terms of industry links, there may be opportunities for the academy to pair up with employers (UK or international) to help provide a supply of season labour.</p>	It is unlikely that a virtual or blended learning academy would establish close personal relationships in the same way a physical space would. Nevertheless, social media and online portals could provide a useful space for attendees to share career advice and experiences, and useful travel information (e.g. visa applications).	

In Work Training

	Physical Space	Blended Learning	Virtual Course
Recruitment	The in-work training modules would be driven largely by business demands and economic trends that shape demand for the sector. A wide range of specialisms will be offered on a part-time basis, with the option to study full-time during the low season (October to early December, January to March). The courses would be open to individuals with a wide range of experience and would be marketed at employers and the existing workforce. Within the course, there is the opportunity to develop industry partnerships – by sending students on ‘away days’ to learn best practice and develop new ideas / products / processes they can bring back to the industry.		
Delivery	<p>Each module would last approximately two months. Students would be expected to attend the academy once a week (around work commitments). They may work with their employer during working days to ensure any objectives or training objectives are being met. The course options would be extended versions of that offered by the elite management course, and could include:</p> <ul style="list-style-type: none"> • outdoor leadership • menu planning and design • craft food • sustainability values • cultural backstory • event management • understanding customer trends • digital marketing and engagement • leadership and management • culinary trends • 21st Century entrepreneurship. <p>The option for a potential bistro café / restaurant onsite at the academy would also allow for students to study and learn, whilst working in a real world environment, that could potentially be open to the public.</p>	<p>Blended learning options would provide some online and in-person training. This would offer a high degree of flexibility for those with employment commitments, or geographical barriers.</p> <p>The course could offer more of a flexible approach to in work training. Students could select and choose short courses / day training within industry and the academy. It would develop understanding and experiences, through tailored made courses according to employer and staff needs.</p>	<p>Online / virtual learning could be highly flexible for training around work commitments. Online content could include:</p> <ul style="list-style-type: none"> • live online video tutorials, podcasts and communication with industry experts • virtual reality learning could provide students experience of in-work training and learning, such as acting as a chef in virtual reality. Similar to scenario training. <p>This also allows for social inclusion of disadvantaged students who may want to study in work training however cannot due circumstances.</p>

Curriculum	Course content would be dependent on students current knowledge and experience. The offer could be an overall workplace approach or more specialist subject areas. The potential for ongoing short courses can be delivered by the academy, partners and online. Modules will build up skills and experience portfolio for students, plus added value of real environment experience for CVs.		
Mentoring and Coaching	The aim of mentoring and coaching would be that students would learn from professionals in their field via interactions with mentees.	The blended learning and virtual course gives a unique aspect to mentoring and coaching. There would be a potential for online mentors to provide one-to-one guidance and feedback to course participants. Alternatively, another option would be for the employer to nominate a mentor within the workforce.	
Career Progression	To support career progression, employers could be encouraged to offer promotions or new responsibilities to individuals who complete the course.	Blended and online courses can help enhance current local tourism and hospitality business, this will encourage business growth within the industry with upskilled staff.	
Network	Network opportunities would be available, as student may not be just located at one industry partner establishment. Students therefore, would learn a diverse set of skills from varied professionals / mentors. There is also the potential for created networks amongst students and their peers from group learning.	Blended learning would allow for current business staff, currently learning new skills or experiences, to network with current full-time students.	It is unlikely that a virtual or blended learning academy would establish close personal relationships in the same way a physical space would. Nevertheless, social media and online portals could provide a useful space for attendees to share career advice and experiences.

Sharing Sector Best Practice

	Physical Space	Blended Learning	Virtual Content
Events	<p>A physical space would offer the opportunity to host a number of events that enable the dissemination of ideas and stir people within the industry into action.</p> <p>This could include:</p> <ul style="list-style-type: none"> • Industry wide conferences that would encourage interaction between businesses in the sector and participants of the academy. • Seminars where those in the academy can learn from industry experts. • An Ideas festival that would allow for the co-production of knowledge relevant to drive change within the tourism and hospitality sector. 	<p>Attempting to both utilise physical space and the opportunities of virtual content could include the live streaming of events.</p> <ul style="list-style-type: none"> • The DO Lectures have attempted to sublate the constraints of hosting a physical lecture series by broadcasting their talks online. • By doing so, they have shared knowledge with approximately one million people online. • The academy has the potential to utilise similar possibilities to become a recognised provider of knowledge dissemination within the tourism and hospitality sector on a mass scale. 	<p>By focusing solely on producing virtual content the academy could undertake webinars in order to share knowledge of industry best practice.</p> <ul style="list-style-type: none"> • A webinar involves a presentation, lecture, workshop, or seminar that is hosted using video conferencing software. • The academy could pursue such an option to engage with an international audience and share in the benefits of engaging with international practitioners within the sector.
Network	<p>The academy has the potential to share a physical space with businesses in the sector to encourage the interchange of ideas and to allow training within the academy to be relevant to industry needs.</p> <ul style="list-style-type: none"> • Hospitality 16 has training programme called 'The Hub' where recruits gain real life hospitality experiences as part of their training. • This physical space could be used by students for free as part of their provision, but businesses could 'rent' spaces in which engagement takes place. 	<p>An online network for connecting businesses, students, and alumni of the academy could be a useful tool for engagement in either a blended learning environment or one that was solely online.</p> <ul style="list-style-type: none"> • The academy can develop an online portal that could create a network between current students and those who have undergone a course of training. A portal would allow sector wide and academy news to be shared amongst participants as well as supporting a network of academy alumni. • An online network also has the potential of allowing for engagement and shared learning between alumni and current students by allowing those who have successfully pursued careers within the tourism and hospitality sector to share their experiences. 	

<p>Content Production</p>	<p>The production of online content is something that could take place within all of the iterations of a future academy. It is important for a future academy to produce its own content that will both encourage interactions with industry leaders as well as to recruit participants.</p> <ul style="list-style-type: none"> • Blogs – The academy could share best practice content and innovative ideas through online blogs. The medium would allow the academy to promote its tourism and hospitality expertise as well as becoming an informative site to engage with other industry leaders. • Social media – Using social networking sites such as Twitter, Instagram, Facebook and YouTube would allow the academy to engage with a wide audience and build a relationship with key stakeholders within the sector. • Videos – Using videos to promote the academy is a useful way to share tacit knowledge within the sector. The academy could use Typsy which is an online platform that allows tourism and hospitality instructors from all over the world to upload short training videos. • Podcasts – Podcasts have become a hugely popular medium to communicate, often complex topics, through story-telling. The academy could use podcasting as a means to discuss a variety of topics that are shaping the tourism and hospitality sector. 	
<p>Academy Ambassadors</p>	<p>Utilising academy ambassadors is something that could take place both physically within a future academy and through some engagement online. academy ambassadors could consist of alumni students who then represent and promote the work of the academy in colleges to encourage admissions and to engage with businesses within the tourism and hospitality sector to share best practice.</p> <p>An ambassador role could include responsibilities to:</p> <ul style="list-style-type: none"> • Be the focal point for alumni, students and prospective students • Actively network to advocate the brand of the academy • Develop business connections to support alumni activities • Provide support for careers related activities 	<p>Social media influencers could be employed online to present the innovative work of the academy and cement its reputation as a place of world leading training within the sector. They could also promote those who have undergone a course of education with the academy and become successful leaders.</p>