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Tourism and Hospitality Training Academy

Work Package 1 – Scoping Paper

Funded in partnership by Bluestone National Park Resort and the European LEADER Fund for Rural Development

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Glossary

Acronym	Definition
WEF	World Economic Forum
PPP	Purchasing Power Parity
UN	United Nations
OECD	Organisation for Economic Co-operation and Development

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Executive Summary

Introduction

i. Miller Research has been appointed by Bluestone Resorts Ltd to outline the context and vision for a new tourism and hospitality training academy in West Wales.

ii. The aim of work programme one (WP1) is to deliver a series of scoping exercises, to generate an evidence base that establishes the context in which a potential academy would be delivered. The aim of this work package and what is presented in this report is thus to stimulate thinking and shape ideas around what an academy could comprise.

Approach

iii. To frame the research, a **theory of change logic model** was established, to:

- Identify the context and need for the programme – the 'problem solving' aspect of the 'academy'
- Outline key inputs and activities that an academy may deliver
- Classify short, medium- and long-term impacts of the academy – its effects

iv. The sector was additionally engaged, via a half day workshop with the steering group for this project. Attendees represented a range of organisations within the sector, to provide a holistic perspective of skills needs and challenges for growing the industry in Wales.

v. A desk-based review was undertaken to review barriers to people entering the tourism industry, current and future projections of skills gaps, and global trends for the sector.

Key Findings

Global trends

vi. Globally, there are several trends shaping the future of tourism, and therefore skill demands for the sector. The rate of technological advances threatens low-skilled jobs through automation. Future job

opportunities are more likely to focus on utilising 'big data' to tailor consumer experiences and marketing, alongside using virtual reality and the 'internet of things'.

vii. The 'ethical consumer' is on the rise, with generally greater public concern about the environmental implications of their behaviour. This has a number of implications for skills demands with ecological conservationists, and low-carbon innovators in high demand.

UK and Wales

viii. The desk-based analysis confirmed stakeholder perceptions about what challenges the sector faces in terms of access to skills, and staff retention. Primarily, the real and perceived barrier of low pay, unsociable hours, and a lack of career progression continue to effect recruitment to the sector.

ix. In terms of training delivery – there are a number of further education and in work placement opportunities present within Wales, offering qualifications in hospitality and tourism, business management, and specialist vocational skills (e.g. for chefs). Nevertheless, existing research has demonstrated a number of current gaps in terms of delivery relating to: entrepreneurship and self-sufficiency, customer service, interpersonal skills, adequate work placements, and tailor made training provision for individual business needs.[1]

A Future Academy: Opportunities and Threats

Opportunities

x. A review of wider policy and literature have highlighted a number of **growth trends** for the sector, that Welsh tourism is well positioned to deliver against: eco-tourism, digital technology, automation, an ageing population, and experiential travel. These each have implications for training such as - local knowledge, STEM / IT, social media, data analytics, and sustainable practices / conservation.

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[1] Colegau Cymru (2017) "Gammon, egg and chips in a pub night after night" [http://www.collegeswales.ac.uk/uploads/img/Gammon%2C%20egg%20and%20chips%20in%20a%20pub%20night%20after%20night%20English%20Final.pdf]

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xi.   There is an opportunity for the 'academy' to utilise Wales' natural assets as a pull factor for potential students – such as by embedding outdoor adventure courses as extra-curricular activities, or as part of the curriculum.

xii.   Another existing 'asset' within Wales relates to existing 'success stories' in in Wales – such as festivals, restaurants, outdoor adventure venues, and resorts. By networking with these businesses, there is opportunity for the sector to shape the curriculum and also provide students with useful work placements.

xiii.   The 'academy' is additionally well placed to deliver against existing legislation in Wales – including economic growth strategies and the Wellbeing of Future Generations (Wales) Act.

Threats

xiv.   The outcome of the Brexit negotiations are currently unclear – however it is likely that withdrawal from the EU will lower labour supply for the tourism industry, reduce overseas visitors, and restrict the ease at which good (e.g. food and drink products) are imported from EU countries. The resilience of the sector will affect the viability of the 'academy' economically.

xv.   Existing provision in (West) Wales means that a future academy needs to remain distinct from the existing offer. There is a risk that it is viewed in competition rather than in partnership with existing provision.

1. Introduction and background

1.1 Miller Research has been appointed by Bluestone Resorts Ltd to outline the context and vision for a new tourism and hospitality training academy in West Wales.

1.2 The project is structured into three work programmes; the first aims to scope the context of training and skills needs in Wales, and the key findings from this phase are documented in this report.

1.3 Work programme two will focus on a long term 'vision' for the academy, building on the evidence from work programme one and taking views from innovative practitioners in the industry. The third work programme will be developed internally by Bluestone or commissioned separately and the key output from this final stage will be a business plan and blueprint for a tourism and hospitality training academy.

1.4 The second chapter of this report outlines the research approach and key aims and objectives for work programme one. The third chapter outlines global, and Welsh trends in tourism and hospitality, the fourth chapter discusses barriers to employment and skills development in tourism, the fifth chapter covers international best practice in terms of policies, initiatives, and programmes, the sixth chapter provides examples of good practice training academies in other sectors, the seventh chapter comprised a summary analysis of the strengths, weaknesses, opportunities and threats for the academy and finally the chapter also provides an overview of early insights gathered from this first work programme and the implications this may have for an academy.

2.   Methodology

Aims

2.1   The aim of work programme one (WP1) is to deliver a series of scoping exercises, to generate an evidence base that establishes the context in which a potential academy would be delivered. The aim of this work package and what is presented in this report is thus to stimulate thinking and shape ideas around what an academy could comprise.

2.2   The diagram below outlines the research aims, approach and sector input to WP1.

Figure 2.1 Approach to WP1
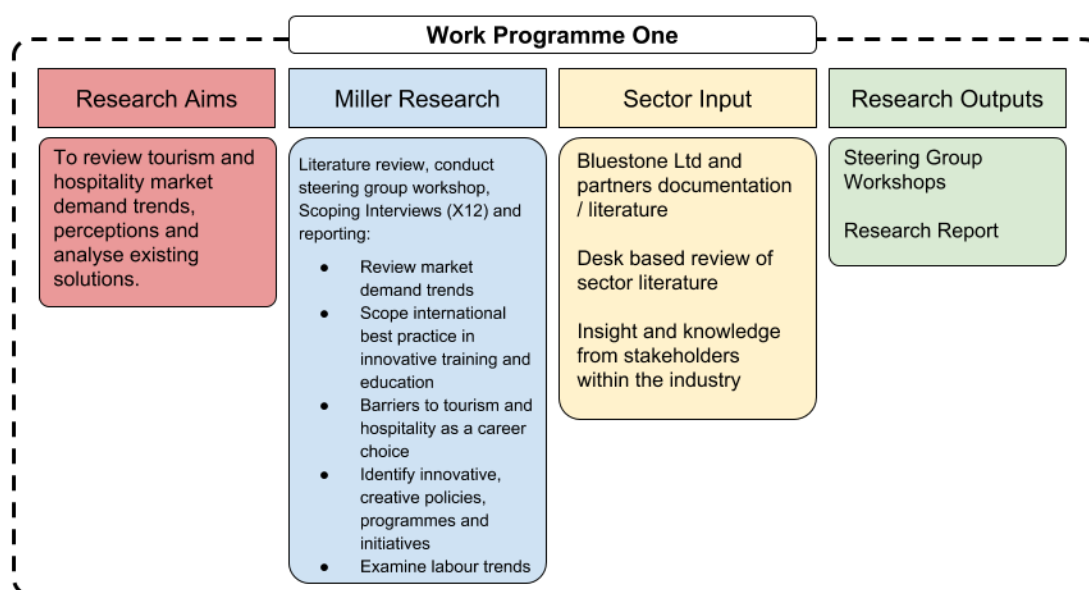
Approach

Project Planning

2.3   The **project planning** phase of WP1 commenced with a short desk-based review to identify recent trends in the tourism industry, and its potential to deliver wider social and economic benefits to West Wales.

2.4   To build on this, a **Theory of Change Logic Model** was established as a means to frame the research. While typically used for evaluation

purposes, the logic model and theory of change is useful within this research to:

- Identify the context and need for the programme – the 'problem solving' aspect of the 'academy'
- Outline key inputs and activities that an academy may deliver
- Classify short, medium- and long-term impacts of the academy – its effects

Steering Group Workshop

2.5   A half day workshop was held at Fairyhill venue with members of the project steering group. It provided the opportunity to discuss the project, share contacts, and identify best practice and relevant existing research. The findings from the interactive sessions during the workshop have been used to inform this report.

Scoping Interviews

2.6   Interviews have been conducted with key stakeholders both from within the Welsh tourism industry and other relevant sectors. The purpose of these interviews has been to explore the context of the proposed academy, specifically establishing:

- the *need* for the academy
- whether similar initiatives have been considered in the past
- what would appeal to new entrants in West Wales

The interviews have also been used as an opportunity to identify existing research and best practice, to be included within the documentation review. These interviews are on-going and the findings from them will be reported on as part of work programme two.

Desk based review

2.7   A key element of the review was to identify barriers to tourism and hospitality as a career choice and some of the challenges for the sector around recruitment and retention specifically in west Wales. Issues that have been identified include:

- lower qualified workforce, susceptible to moving out into other sectors
- an ageing workforce, moving towards retirement
- low wages, limiting the appeal of the sector
- precarious hours and seasonal employment practices
- pockets of rurality lacking access to services
- poor transportation links and infrastructure
- poor network connection in rural areas.

2.8 Drawing on the evidence gathered in previous stages, we conducted a desk-based review of current literature on these and other challenges for meeting the workforce requirements of the sector. We additionally explored wider attitudes to work and areas outside the tourism sector where initiatives such as links to lifestyle choices have been successful.

2.9 Building on the key themes identified from the initial review, a number of best practice innovative and creative policies, programmes and initiatives were identified, from both within the UK and internationally. For the purposes of the report these have been split into initiatives based within the tourism and hospitality sector, and those outside the industry. Full case studies have been listed as an annex to this report. The purpose of reviewing these case studies was to identify key models, practices and lessons that could be applied to the proposed academy.

2.10 The final element of work programme one was to review labour market trends across Wales as a whole and west Wales in particular, and what they mean for the tourism and hospitality sectors.

Work programme two

2.11 The next stage of the research will build upon the findings identified in work programme one. It will aim to develop more concrete recommendations, ultimately producing a 'vision' for the academy. This will feed into the business plan and 'blueprint' for the academy, which will be developed by Bluestone as part of work programme three.

3.   Tourism Market Trends

3.1   The purpose of this chapter is to review current tourism market demand trends and product development in Europe, Wales and west wales and identify implications for training and education of future workforce. Sources such as the World Economic Forum, Organisation for Economic Co-operation and Development (OECD), and academic research have been considered in this chapter. Global, and Welsh trends in the sector are considered prior to a section that outlines implications for skills demands, and thus the academy.

Global

Growth

3.2   The wider literature and research suggest the global tourism and hospitality industry is expected to experience continued growth. The World Travel and Tourism Council for example calculate 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.[2] This means a growth from 3.2 per cent of global GDP, to 3.6 per cent.[3] 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.

3.3   Changing global demographics – namely, the growth of the middle class – has been attributed to this continued growth. [4] As of 2018, it was calculated that over half the world's population can be considered 'middle class' (those with spending power between $11 and $110 a

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[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] 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]

[4] 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]

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day).[5] In 2010, it was considered that the middle class, those "who contribute in a discrete fashion to economic growth", would increase from 1.8bn people in 2009, through to 3.2bn in 2020, and 4.9bn to 2030 – 85 per cent of this growth from Asia.[6] Significantly, the growth in purchasing power for the global middle class is set to increase from $21.3bn (PPP)[7] in 2000, to $55.7(PPP) in 2030.[8] This increase, alongside access to digital platforms, has and will increase global demand for services (including tourism and leisure).[9] As the purchasing power of Asia overtakes North America, European markets will need to attract this consumer base.

3.4   The OECD highlight another significant change in demographics – aging populations and low fertility rates in many advanced economies.[10] The United Nations have calculated that by 2050 the number of those over 60 years old, is expected to double by 2050, and in Europe account for 35 per cent of the population.[11] 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, due to the high purchasing power of older people and the potential to develop accessible leisure experiences targeted to this group.[12]

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[5] Kharas, H & Hamel, K. (2018) A global tipping point: Half the world is now middle class or wealthier. [https://www.brookings.edu/blog/future-development/2018/09/27/a-global-tipping-point-half-the-world-is-now-middle-class-or-wealthier/]

[6] Kharas, H (2010) OECD Development Centre: The Emerging Middle Class in Developing Countries [https://www.oecd.org/dev/44457738.pdf]

[7] Purchasing Power Parity – measuring economic variables globally without distortion from exchange rates, etc.

[8] *Ibid.*

[9] 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]

[10] *Ibid.*

[11] United Nations (2017) World Population Aging [http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2017_Highlights.pdf]

[12] 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]

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3.5   Alongside changes in demographics, the resilience of the tourism industry is another reason for its expected growth. The tourism sector in Spain for example, continued to grow in 2015 despite rising unemployment, and a lack of growth in other sectors.

Technology

3.6   Advances to technology have, and will continue to, change consumer and business relations to travel and tourism through the foreseeable future.

3.7   WEF and the OECD note that a significant shift has been seen in the way in which marketing targets potential customers. Using 'big data', companies are now able to run campaigns aiming to influence different demographics.[13] 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.[14] The sharing of content via digital platforms is also likely to increase popularity of less-well known destinations as visitors crave 'unique' experiences. OECD and WEF note the risk this places for areas that may not have the required infrastructure – vulnerable communities may be unsuited to a sudden increase in footfall, with potential damage to the environment – alongside social, cultural and economic disruption.[15] The unpredictable nature of this growth adds to the complications – locations and products can go 'viral' overnight.[16] Backlash to 'over-tourism' has been observed in small communities through to established destinations (e.g. Barcelona, Cornwall), where

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[13] 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]

[14] 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]

[15] *Ibid.*

[16] 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]

local residents experience an increased cost of living and the commodification of local culture.[17]

3.8 Nevertheless, digitalisation is expected to add significant financial value to tourism and leisure globally. Research commissioned for the European Commission specifically notes that tourism business through digitalisation, will gain access to:[18]

- New customers
- Improved online visibility
- Greater international outreach
- Increased visitor satisfaction
- Improved service quality

A number of governments and tourism agencies are investing heavily into the acquisition and use of such data. The New Zealand Government, for example spend over $3 million (NZD) a year on collecting and analysing data relating to tourism – to better understand consumer spend – and developing regional indicators from which to gain tourism insights.[19]

3.9 In terms of skills and jobs, there is also a risk to certain job roles – one hotel chain in Japan has developed a hotel in which some of the job roles are undertaken by robots (such as check-in).[20] Similarly, UK chains such as Premier Inn now have automated check-in for guests. Overall, automation and artificial intelligence is likely to reduce demand for low-skilled jobs, but increase demand for other roles – such as creative skillsets for advertising, and for collaborating between

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[17] National Geographic (2018) Overtourism: too much of a good thing [https://www.nationalgeographic.com/travel/features/overtourism-how-to-make-global-tourism-sustainable/]
[18] Dredge, D. Phi, G. Renuka, M. Meegan, E & Popescu, E for the European Commission (2018) Digitalisation in Tourism: In Depth Analysis of Challenges and Opportunities
[19] OECD (2016) Country Profiles - New Zealand, in *OECD Tourism Trends and Policies 2016*
[20] 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]

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stakeholders / industry players, and subsectors.[21] Alongside the policy landscape and digital infrastructure, a key barrier that prevents SMEs from capitalising off digital opportunities often relates to accessing staff with the relevant skills, and the time taken to develop new digital competencies. [22] Importantly, the sector will rely more on IT / STEM skills than previously, to take advantage of the opportunities presented by automation, AI, big data, and connectivity.

Sustainability

3.10   The moves towards more sustainable tourism practices, is being driven by policy makers, businesses, and consumers. Tourism accounts for about five to eight per cent of climate change – primarily from transport and accommodation.[23] Other factors impacting negatively on natural resources include food production, water usage, and waste generation.[24] The impacts of climate change on tourism are likely to be significant – a change in weather patterns will effect access to areas, and disrupt food and drink supply chains (e.g. due to drought or flooding).

3.11   Nonetheless, there are positive dynamics between climate change and the tourism industry. Policy makers seek to meet international targets on CO_2 reduction and waste management, tourism businesses aspire to preserve the 'appeal' of the area in which they are located, and consumer behaviours are increasingly changing to be more considerate of environmental impacts.

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[21] WEF in collaboration with Accenture (2017) Digital Transformation Initiative: Aviation, Travel and Tourism Industry. [https://geosureglobal.com/assets/ee/files/WEF_-_DTI.pdf]
[22] Dredge, D. Phi, G. Renuka, M. Meegan, E & Popescu, E for the European Commission (2018) Digitalisation in Tourism: In Depth Analysis of Challenges and Opportunities
[23] UNWTO (2018) FAQ – Climate Change and Tourism [http://sdt.unwto.org/content/faq-climate-change-and-tourism]
[24] 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]

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3.12   As awareness of climate change and depleting resources grows, "a low carbon lifestyle has been valued all over the world."[25] '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.[26] Research focusing on consumer behaviours in the Western Costa Del Sol (Andalusia, Spain) suggests found that visitors / tourists with "high levels of sustainable intelligence"[27] were willing to pay more for "sustainable destinations" however not all consumers have the same level of awareness / commitment to environmental causes. [28] Those with lower levels of awareness or concern were, unsurprisingly, typically less likely to pay more for sustainable practices.[29]

3.13   Alongside a change in consumer behaviour (where visitors may look to minimise their carbon footprint), experiences that offer visitors the opportunity to interact with the natural environment are growing in popularity.[30] TrekkSoft, for example found that ecological tours were the most popular tour offer in their 2018 survey – with consumer preference to those operators who actively undertook conservation efforts such as habitat restoration. [31] The United Nations Environmental Programme (UNEP) and WTO similarly note that while 'traditional' holiday markets (e.g. beach and sun resorts) have reached a steady growth, spend on ecotourism is increasing at a higher rate than the industry average, with 'nature based' tourism experiences comprising a significant proportion of the entire tourism market.[32] Alongside

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[25] Yang, Y. (2015) Implementation Strategies of Low Carbon Tourism [https://pdfs.semanticscholar.org/c3ae/cc8c18d209c9dc2cb026d4ed0f6fce2a36cd.pdf]
[26] UNWTO and UNEP (2012) Tourism in the Green Economy: Background Report [https://www.cbd.int/financial/doc/tourism-greeneconomy.pdf]
[27] Those with high levels of knowledge, sustainable behaviours, awareness and commitment to environmental sustainability
[28] Puliod-Fernandez, J. & Lopez-Sanchez, Y. (2016) Are Tourists Really Willing to Pay More for Sustainable Destinations?
[29] *Ibid.*
[30] TrekkSoft (2018) Travel Trends Report 2018
[31] *Ibid.*
[32] UNWTO and UNEP (2012) Tourism in the Green Economy: Background Report [https://www.cbd.int/financial/doc/tourism-greeneconomy.pdf]

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consumer demand, business owners are often incentivised to undertake ecological projects as a means to ensure financial (as well as environmental) sustainability by securing the longevity of their business. [33]

3.14 The implications of this on access to skills is that future tourism business leaders will need the ability to develop new, customer friendly, low-carbon and waste-minimising tourist attractions. While sustainable tourism provides financial opportunities with some visitors willing to pay more, research suggests specific outreach will be needed to advertise the benefits of sustainable tourism to those who do not already prioritise sustainable practices in their consumer choices.

Experiential Travel

3.15 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 narrative. Trekksoft highlight "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.[34] Other descriptions of this trend use language such as "meaningful experiences", or "life fulfilling".[35] Peak and Swift consider the three main aspects of experiential travel as:[36]

- inspiration
- personalisation
- a path towards self-discovery

Central to this, is a search for authenticity. As stated by Charlie Scott, a co-founder of Trufflepig, a custom trip planning company:

> "So, let's say you're in Cornwall and you have an interest in tall ships, who would you rather have explain everything there is to

[33] TrekkSoft (2018) Travel Trends Report 2018
[34] Trekksoft (2018) Travel Trends Report 2019
[35] Swift Team and Peak Adventure Travel Group (2014) The Rise of Experiential Travel
[36] *Ibid.*

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know about tall ships? Is it someone with a mass tourism
industry background or someone who's working on the ship?"[37]

This is shaping the way in which all aspects of the industry are
operating. Peak and Swift note 'experiential hotels' in which links are
made for visitors to interact and engage with local communities and
culture, alongside the greater promotion of 'adventure' within regional
or national travel bureaus as consumers (even high-end travellers)
have greater demand for off-grid experiences.[38]

Policy

3.16   Given the potential for tourism to deliver upon economic growth, a
number of countries have passed legislative packages from which to
grow the sector. A key challenge is coordinating the areas that
comprise the tourism sector (taxes, transport, conservation,
accommodation, etc).[39] Examples below demonstrate innovative ways
in which countries have attempted to enable growth.

3.17   A key barrier for visitors can often relate to visa / entry requirements.
Nations and countries have to balance national security with
opportunities for economic growth (e.g. international trade, tourism,
foreign investment).[40] The OECD highlights a number of ways in which
countries have enabled greater access to (tourist) visas, on global or
bi-lateral bases:[41]

- The introduction of a short, three to four-day tourist visa in
  Russia.

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[37] Charlie Scott, quoted in Swift Team and Peak Adventure Travel Group (2014) The Rise of
Experiential Travel
[38] Swift Team and Peak Adventure Travel Group (2014) The Rise of Experiential Travel
[39] Ismet, B. & Abuhjeeleh, M. (2016). The Analysis of Tourism Policies by Different
Governments and their Potential Implementation in North Cyprus Economy
[40] Neumayer, E. (2010) Visa Restrictions and Bilateral Travel. LSE Online.
[http://eprints.lse.ac.uk/28351/1/Visa%20restrictions%20and%20bilateral%20travel(lsero).pdf]
[41] 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]

- Australia visa liberalisation with growing visitor markets, including 10-year visas for Chinese nationals, and three-year visas for Indian, Thai, Vietnamese and Chilean nationals.

- France has reduced the times taken to process visa applications from nationals from ten different countries to speed up the process.

3.18   Another way in which some countries have sought to increase footfall and visitor spend, is to integrate sustainability within the tourism agenda. Slovenia has placed sustainability at the heart of their national agenda – Ljubljana was the first capital city in Europe to reach 'zero waste' status through ambitious recycling and waste prevention plans.[42] Environmental protections have been embedded into Slovenia's tourism policy, with the introduction of the European Flower ecolabel for accommodation and establishment of the Slovenia Green scheme.[43] These aim to encourage sustainable practices within businesses – for example in conservation efforts and renewable energy generation, alongside use of local supply chains. Importantly these accreditations are visible to enable consumer choice.

3.19   Alongside the above, a number of nations have paid particular attention to human resources and skills as a means to grow their domestic and international tourism markets. Skills Development Scotland (the national skills body) has recognised a number of issues facing the sector including retention, low pay etc. The 'Action Plan' outlines a number of steps to improve growth which includes:[44]

- Working with employers to develop a Skills First Approach, so they can direct staff to appropriate training

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[42] Zero Waste Europe (2015) New case study: The story of Ljubljana, first Zero Waste capital in Europe! [https://zerowasteeurope.eu/2015/05/new-case-study-the-story-of-ljubljana-first-zero-waste-capital-in-europe/]
[43] OECD (2016) Country Profiles – Slovenia, in OECD Tourism Trends and Policies, 2016
[44] Skills Development Scotland (2016) Skills Investment Plan for Scotland's Tourism Sector [https://www.skillsdevelopmentscotland.co.uk/media/42345/tourism-digital-skills-investment-plan.pdf]

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- Working with all stakeholders (universities, Jobcentre Plus, Scottish Tourism Alliance, etc) to promote the quality of employment and sustainable careers in the industry

- Developing partnerships between all secondary schools and a tourism employer to increase the attractiveness of the sector to potential new entrants

- Promoting management careers to young people, to raise visibility of career progression in the sector.

Wales

3.20 This section of the report considers how the above global trends relate to the tourism industry in Wales, alongside whether there are any emerging trends not present globally.

Sustainable Tourism and Unique Experiences

3.21 As stated by UNEP and UNWTO "rural and community tourism are… expected to grow most rapidly over the next two decades."[45]. This is a trend that Wales has been able to capitalise upon and be regarded as a leader. Nationally, Wales has a number of policies aiming to increase its environmental credentials across all sectors including:

- The Wellbeing of Future Generations (Wales) Act 2015
- The Environment (Wales) Act 2016
- State of Natural Resources Report
- Energy Wales: A low carbon transition

3.22 South west Wales has been highlighted as an innovator in terms of eco-tourism, with research pointing to the human capital alongside the already prominent use of renewable technologies in the region.[46]

3.23 Business leaders in the area are often quick to realise that the landscape (e.g. coastline) is what draws many visitors to the region –

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

[46] Porter, J. Pinto, H. & Cruz, A.R. (2012) Economic Resilience and Tourism Destinations: eco and cultural responses to turbulent contexts in coastal areas. [https://eg.uc.pt/bitstream/10316/79778/1/Economic%20resilience%20and%20tourism%20destinations.pdf]

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and are therefore able to capitalise upon this demand. This is particularly relevant to the discussions of 'experiential travel' as discussed above. 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.[47]

Language and Heritage

3.24 An oft-cited advantage of Wales' tourism offer is that it "has more castles per square mile than any other country in Europe".[48] 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 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.[49] Further demonstrating the value of such sites, a study commissioned by CADW suggests that the 'historic environment sector' contributes approximately £640 million to Wales' GVA, and £1.8 billion in terms of output.[50] Alongside economic impact, associated benefits include environmental and social wellbeing – through the development of a sense of place, and community identity.[51]

3.25 Historic places of worship additionally add to the cultural richness of the Welsh tourism offer. There are approximately 3000 such sites listed in

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

[48] 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]

[49] 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]

[50] ECOTEC for CADW (2010) Valuing the Welsh Historic Environment [https://cadw.gov.wales/docs/cadw/publications/ValuingWelshHistoricEnvironmentSummary_EN.pdf]

[51] ECOTEC for CADW (2010) Valuing the Welsh Historic Environment [https://cadw.gov.wales/docs/cadw/publications/ValuingWelshHistoricEnvironmentSummary_EN.pdf]

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Wales – 214 of which are listed at Grade 1.[52] The Faith Tourism Action Plan (FTAP) was published in 2013 to support wider (cultural) tourism objectives from Welsh Government. The FTAP includes the following objectives:[53]

- Attract more visitors to Wales' Places of Worship
- Enhance the quality of the Welsh Faith Tourism product and the experience of visitors to Wales' Places of Worship
- Increase the yield from visitors to Wales' Places of Worship

3.26   Related to the trend of 'experiential travel', Coupland and Coupland note that the industrial aspects of Wale's heritage are often framed in relation to their authenticity in which visitors are able to take a first-hand experience of history.[54] Activities and attractions include The Big Pit, St Fagan's, and Dolaucothi Gold Mines.

3.27   Another 'asset' of Welsh culture that delivers a unique and authentic experience, is that of the Welsh Language. Welsh Government has taken proactive measures to increase education and use of the Welsh Language, of note Iaith Pawb the Welsh Government's national Plan for a Bilingual Wales, which was published in 2003. Coupland researches how Welsh language is framed within its use in public spaces – with regards to tourism, it is often used to add to 'authentic values' as "Europe's oldest living language."[55] Some research has posed the use of language as a tourist commodity as a risk; however, Coupland makes the counterargument that seeing language as a risk, bypasses its cultural value, and thus risks the overall cultural

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[52] Cadw and Welsh Government (2015) Strategic Action Plan for Historic Places of Worship in Wales
[https://cadw.gov.wales/docs/cadw/publications/historicenvironment/29012016CadwHistoricPlacesOfWorship-en.pdf]
[53] Welsh Government (2013) The Faith Tourism Action Plan for Wales
[https://gov.wales/docs/drah/publications/131024-the-faith-tourism-action-plan-for-wales-en.pdf]
[54] Coupland & Coupland (2014) The authenticating discourses of mining heritage tourism in Cornwall and Wales. [https://onlinelibrary.wiley.com/doi/abs/10.1111/josl.12081]
[55] 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]

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distinctiveness it otherwise offers.[56] Similarly, surveys of local populations in Wales found that non-Welsh speaking migration driven by the growth of tourism risks day-to-day use of Welsh as a working language.[57]

Events

3.28 Welsh tourism has benefitted from a wide range of high-profile events in recent years, ranging from global international politics (2016 NATO summit), sports, music festivals (e.g. Festival No 6, and Green Man) through to food festivals (e.g. Abergavenny Food Festival), and classical music (Welsh National Opera). These significantly add to the cultural capital of Wales as a desirable destination, alongside the view that the area may offer something 'unique'. Furthermore, the range of events on offer means a diverse crowd is attracted to the area.

Policy and Legislation

3.29 It is important to consider the wider policy arena that effects the development of the tourism sector and access to skills, to identify how a hospitality training academy could deliver on wider strategic objectives for policy makers. This section therefore considers recent significant developments in Wales (e.g. the Environment (Wales) Act 2016) and future threats / opportunities – namely, Brexit.

Sustainability

3.30 As stated above, there is a significant sustainability policy agenda driven by Welsh Government, as a means to reduce reliance on fossil fuels, and manage resources more effectively (e.g. waste management).

3.31 The Well-being of Future Generations (Wales) Act 2015 (WFG Act) requires all public bodies to consider seven Well-being Goals, five Ways of Working, and 42 National Indicators when discharging their

[56] *Ibid.*
[57] Phillips, D. (2018) 'Welcome to Wales?', in University of South Wales. [https://www.wales.ac.uk/en/CentreforAdvancedWelshCelticStudies/ResearchProjects/CompletedProjects/SocialHistoryoftheWelshLanguage/WelcometoWales.aspx]

duties. The act promotes economic growth that delivers a holistic view of wellbeing: social, cultural and environmental as well as economic. The WFGA outlines a number of wellbeing goals, set out as follows:

- A prosperous Wales
- A resilient Wales
- A healthier Wales
- A more equal Wales
- A Wales of cohesive communities
- A Wales of vibrant culture and thriving Welsh Language
- A globally responsible Wales

3.32   The *Environment (Wales) Act 2016* references the WFG Act and focuses on the environment as a means of creating healthy and resilient communities. The Act also requires Natural Resource Wales to produce a *State of Natural Resources Report* (SoNaRR), which assesses the management of natural resources in Wales and provides recommendations regarding different aspects of well-being.

3.33   A further statutory requirement of the Environment (Wales) Act is the production of a *Natural Resources Policy for Wales*, the first iteration of which was developed from the findings of the 2016 SoNaRR and published in August 2017. The document outlines three priorities for managing natural resources in Wales: delivering nature-based solutions, increasing renewable energy and resource efficiency, and taking a place-based approach.[58]

3.34   Overall these policy developments 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.

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[58] Welsh Government (2017) Natural Resources Policy
[http://gov.wales/docs/desh/publications/170821-natural-resources-policy-en.PDF].

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Economic Growth and Tourism

3.35   A number of policies and strategic documents outline a vision for
Wales' economic growth, and the ways in which the tourism sector may
contribute to growing prosperity. As mentioned above, the WFGA
obligates public bodies to consider sustainable practices as part of new
developments. Tourism in Wales contributes to £3.1 billion per annum
GVA, and a total contribution of £6.9 billion – 13.9 per cent of the total
economy.[59] Because of this significant contribution of tourism to the
Welsh economy, it features heavily in wider strategic documents that
seek to increase economic growth in the sector.

3.36   'Prosperity for All' was published by Welsh Government in 2017 and
further developed the core themes in 'Taking Wales Forward'. Central
to the landscape of business support, the document outlines that Welsh
Government will, among other measures:

- Commit to an 'Economic Contract' between business and
government to stimulate growth.
- Rationalise the range of financial support offered to businesses.
- Use business support to develop innovation capacity in Wales.

Importantly, the document recognises that the UK's withdrawal from the
EU may affect businesses, and there will be a need to build economic
resilience as the economy faces uncertainty about the outcome of
negotiations. The strategy specifically outlines Welsh tourism as
potentially at risk due to Brexit and states that:

> "We are leaving the EU, but we are not leaving Europe. Our
> reputation as a leader in areas such as sustainability, culture
> and research much be maintained, and Wales will remain an
> engaged European – and global – nation."[60]

3.37   The Welsh Government Strategy for Tourism 2013-2020 outlines a
number of ambitions for growth. Although published prior to the WFGA,
the strategy clearly aligns with the broad aims of delivering inclusive

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[59] Wales Tourism Alliance (2018) WTA Policy [https://www.wta.org.uk/wta-policy.html]
[60] Welsh Government (2016) Prosperity for All: Taking Wales Forward
[https://gov.wales/docs/strategies/170919-prosperity-for-all-en.pdf]

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growth and wider benefits for the people of Wales and those working within the sector. In relation to skills and training, the strategy outlines a number of focus areas for developing 'people' in the industry:[61]

- Customer care: developing a culture of service and hospitality to increase competitiveness of the sector
- Demand-led skills: aligning skills support with industry requirements, and development of a 'national skills framework'
- Specialist skills: increasing professionalism of those within the industry to meet future visitor demand (e.g. chef skills, languages, and management).
- Changing perceptions of the sector: challenging the view that tourism and hospitality does not offer sustainable employment or career progression.

Brexit

3.38   The negotiations of the UK's withdrawal from the European Union are currently underway, with a possible extension of Article 50 into the summer of 2019 (if not longer). The future relationship of the UK with the EU is therefore unknown. It is, however, possible to discuss some potential effects on the tourism industry in Wales and access to skills. These include – restrictions to freedom of movement, changes to supply chains, EU funded projects in Wales, and ongoing 'readiness preparations' in Wales.

3.39   It is likely that a future deal with the EU will result in some restrictions in freedom of movement of people between the UK and EU member-states. Firstly, this is likely to effect overseas visitors to Wales. As discussed below, 48 per cent Almost half (48 per cent) of overseas visitors to Wales were residents of the EU (mainly Irish and German citizens). If visa requirements for EU visitors to the UK are implemented (e.g. requiring with financial costs, and paper work) – visitors may be

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[61] Welsh Government (2013) The Welsh Government Strategy for Tourism 2013-2020: Partnership for Growth [https://gov.wales/docs/drah/publications/130613-partnership-for-growth-en.pdf]

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decline. Other issues that may negatively affect foreign visitor numbers: [62]

- Loss of consumer protection legislation (e.g. the Package Holiday Directive)
- EU visitor access to healthcare (e.g. use of the European Health Insurance Card)
- The UK's inclusion within the European Common Aviation Area which reduces costs of air travel for consumers

On the other hand, if the value of the pound decreases with Brexit, the UK may experience an increase in foreign visitors if it is deemed as a more affordable destination. [63] This is also likely to impact British citizens – for whom travel abroad will become expensive, and therefore may be more likely to have a 'staycation' instead.[64]

Figure 3.1 Proportion of EU Citizens Employed in UK and Welsh Industry
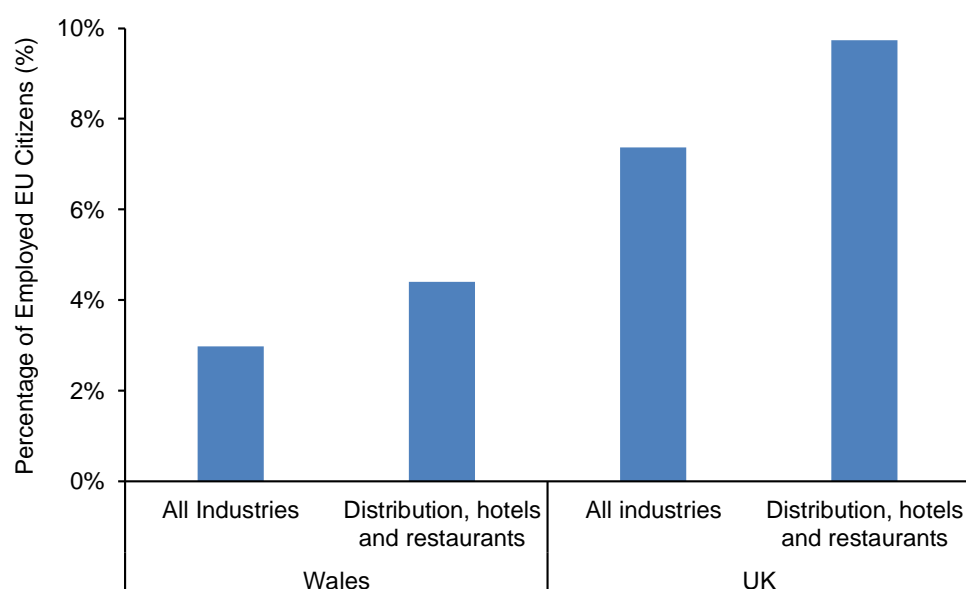
Source: ONS (2018) Number of UK nationals, EU nationals, and non-EU nationals in employment by industry and region, April 2017 to March 2018, analysis by Miller Research[65]

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[62] Tyler, G & Rhodes, C. (2019) House of Commons Library: Tourism: statistics and policy
[63] Tyler, G & Rhodes, C. (2019) House of Commons Library: Tourism: statistics and policy
[64] Tyler, G & Rhodes, C. (2019) House of Commons Library: Tourism: statistics and policy
[65] ONS (2018) Number of UK nationals, EU nationals, and non-EU nationals in employment by industry and region, April 2017 to March 2018

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3.40   A second implication of Brexit on the tourism sector – relates to access
        to skills. Currently, EU citizens are able to work within the UK with no
        restrictions (and vice versa for UK citizens). Figure 3.1 above
        demonstrates that a high proportion of EU citizens are employed in
        tourism (distribution, hotels and restaurants), in comparison to other
        industries. While a smaller proportion for EU visitors make up the
        Welsh labour market (in comparison to the UK) – around 5 per cent (1
        in 20) of those working in Welsh tourism are from the EU. Since the EU
        referendum, the number of EU citizens has fallen to its lowest in five
        years – by 43 per cent.[66] Looking forward, two thirds of the 24 medium
        / large hotel chains are now concerned about future employment as a
        result of Brexit.[67] A solution would be to improve the sector's job
        retention (it is currently at 85 per cent) – which relies on increase in
        pay, a better work/life balance, and stable income / guaranteed hours.[68]

3.41   A further impact of the UK's departure from the EU, is the loss of EU
        funds to Wales. European Regional Development Funds, and Rural
        Development Programme have each contributed to a number of
        projects to develop Welsh tourism and access to skills – these include
        developments of agri-tourism, food and drink supply chains,
        development of food tourism, transport infrastructure, and

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[https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemploye
etypes/adhocs/008687numberofuknationalseunationalsandnoneunationalsinemploymentbyin
dustryandregionapril2017tomarch2018]

[66] ONS: Population estimates for the UK, England and Wales, Scotland and Northern Ireland:
mid-2017, June 2018. Cited in: Deputy (2018) Retaining Britain's Hospitality Workers: How
the UK can avoid a crisis in the hospitality sector
[https://cdn2.hubspot.net/hubfs/3040938/LP%20Assets%20/UK%20Retention%20Report/Dep
uty-UK%20Staff%20Retention%20Report%202018-
Retaining%20Britain%27s%20Hospitality%20Workers.pdf]

[67] TripAdvisor (2018) 2018 Hospitality Sector Report. Deputy (2018) Retaining Britain's
Hospitality Workers: How the UK can avoid a crisis in the hospitality sector
[https://cdn2.hubspot.net/hubfs/3040938/LP%20Assets%20/UK%20Retention%20Report/Dep
uty-UK%20Staff%20Retention%20Report%202018-
Retaining%20Britain%27s%20Hospitality%20Workers.pdf]

[68] Deputy (2018) Retaining Britain's Hospitality Workers: How the UK can avoid a crisis in the
hospitality sector
[https://cdn2.hubspot.net/hubfs/3040938/LP%20Assets%20/UK%20Retention%20Report/Dep
uty-UK%20Staff%20Retention%20Report%202018-
Retaining%20Britain%27s%20Hospitality%20Workers.pdf]

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collaborations between SMEs and higher education institutions. It is currently unclear whether these funds will be replaced in full by the UK central government, or what relationship the UK will have with EU funding mechanisms upon departure.[69]

3.42   Despite the uncertainty surrounding Brexit, a number of preparations are underway to mitigate any difficulties for business in Wales, and to allow them to make use of new opportunities. The Welsh Government – via Business Wales – has set aside £1 million for a 'Brexit Resilience Fund'.[70] Grants of between £10,000 and £100,000 are available for businesses who will be directly affected by changes in the economy from Brexit.[71] SME businesses must demonstrate that they will use the support to safeguard jobs and that they have been trading for at least 12 months.[72] Furthermore, Welsh Government are currently undertaking a wide number of consultations across all sectors in Wales to better understand the needs of businesses (and citizens), in order to improve the 'readiness' of the economy prior to leaving the EU. Close attention will need to be paid to these findings and corresponding policy changes, to ensure a future 'academy' responds to strategic needs of Welsh Government and sectoral growth.

Trends in Visitor Numbers and Activities

Overseas Visitors

3.43   Data from Welsh Government[73] shows that during the first nine months of 2018, international tourism to Wales was worth £320m, despite a fall in visitor numbers of 13 per cent over the previous year.

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[69] Some countries outside of the EU have access to funding streams such as Horizon 2020.
[70] Business Wales (2018) Brexit Readiness Fund
[https://businesswales.gov.wales/brexit/support/brexit-resilience-fund]
[71] Business Wales (2018) Brexit Readiness Fund
[https://businesswales.gov.wales/brexit/support/brexit-resilience-fund]
[72] Business Wales (2018) Brexit Readiness Fund
[https://businesswales.gov.wales/brexit/support/brexit-resilience-fund]
[73] https://gov.wales/docs/statistics/2019/190307-wales-tourism-performance-january-september-2018-revised-en.pdf

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Statistics from the International Passenger Survey (2000-2017)[74] can be used to investigate the comparative growth in overseas visitors to Wales since 2000. The figure below shows overseas staying visitors for England, Scotland and Wales indexed to a baseline for the year 2000. It can be seen that while Scotland increased visitor numbers by 90 per cent over the period, Wales achieved growth of just 10 per cent.

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[74] https://www.visitbritain.org/nation-region-county-data

Figure 3.2 Overseas visitor growth in England, Scotland and Wales, 2000-2017
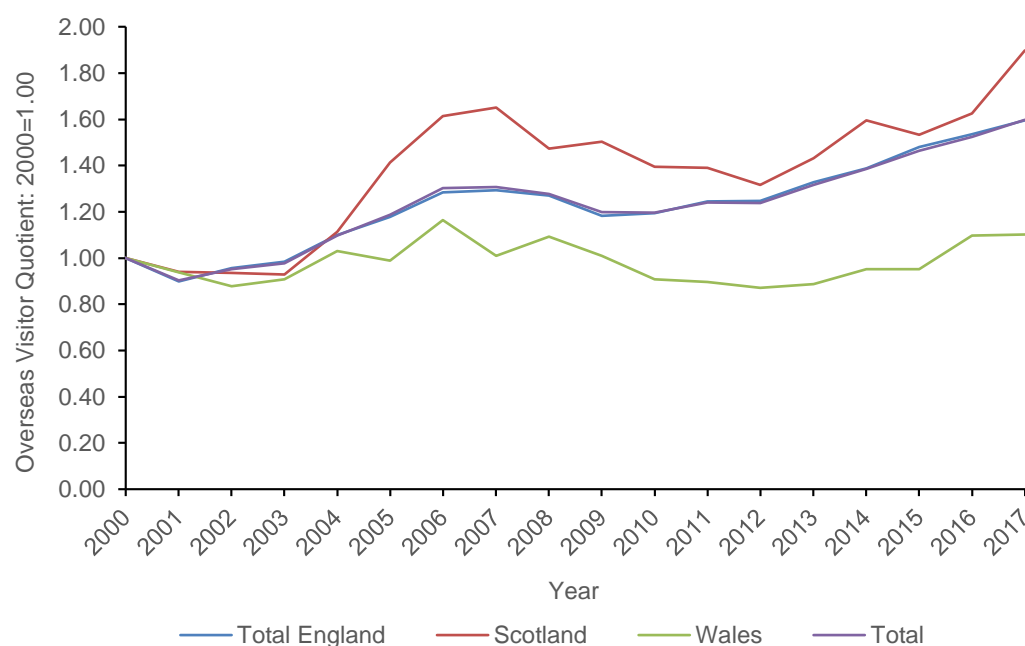
International Passenger Survey, Office for National Statistics

3.44 Statistics from the 2017 survey show that overseas tourism to Wales accounted for 2.4 per cent of all visitor nights in the UK and only 1.5 per cent of the total spend for the UK. In comparison with English regions, Wales secured a lower spend than any region other than the North East and overseas tourism spend in Wales was roughly one sixth of that earned by Scotland. This suggests that the sector could be further developed in Wales amongst overseas visitors.

Table 3.1 Overseas visitors to UK nations and regions, 2017

	Staying Visits		**Nights**		**Spend**	
	000s	**%**	**000s**	**%**	**£m**	**%**
London	19,828	51	114,016	40	13,546	55
North East	556	1	5,029	2	241	1
North West	3,138	8	21,364	8	1,593	7
Yorkshire	1,341	3	11,466	4	567	2
West Midlands	2,322	6	14,159	5	807	3
East Midlands	1,281	3	9,801	3	444	2
East of England	2,407	6	16,751	6	815	3
South West	2,584	7	21,245	7	1,205	5
South East	5,320	14	39,263	14	2,138	9
Total England	34,304	87	253,128	89	21,360	87
Scotland	3,210	8	28,590	10	2,276	9
Wales	**1,079**	**3**	**6,894**	**2**	**369**	**2**
Total UK	**39,214**	**100**	**284,781**	**100**	**24,426**	**100**

International Passenger Survey, Office for National Statistics, 2017

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3.45 Almost half (48 per cent) of all overseas visitors to Wales were residents of the EU (predominately from Ireland or Germany), followed by the USA (15 per cent) and Australia (13 per cent). Those aged 16-34 accounted for approximately one quarter of all overseas visitors in 2016 – unchanged from 2013.

3.46 Overseas visitors were predominately affluent (ABC1s) and one-third of respondents were repeat visitors (within the last three years), with 40 per cent of younger visitors (16-34) with no children taking a short break – reflecting a wider trend in the industry. Overall, the age profile of overseas visitors has reduced, with a growth in the proportion of 35-54-year-old group.

3.47 The main attractors for overseas visitors were the countryside, landscape and beaches (54 per cent of respondents), followed by historic and cultural attractions (48 per cent). Twenty-one per cent of overseas visitors came to Wales specifically to take part in sporting or outdoor activities.

3.48 Overall satisfaction ratings were high; especially for the quality of the environment, feeling of security, places to visit and the friendliness of the people. Two-thirds of visitors also reported that their trip to Wales had exceeded their expectations, suggesting that Wales is something of a "best kept secret". Perceptions of Wales as a sustainable tourism destination were very strong, with 86 per cent of visitors agreeing that Wales is a sustainable destination. Sense of place was less strong than might be expected, with fewer than half of overseas visitors perceiving heritage sites, visitor attractions or food and drink to be distinctively Welsh in character.

3.49 Recent research for Visit Britain[75] examined activities undertaken by overseas visitors to nations and regions of Britain. Wales scored highest of any area on "going to the coast or beaches" (33 per cent of responses against a regional average of 10 per cent), "going for a walk,

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[75] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_165_regional_activities.pdf

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hike or ramble" and "walking along the coast". Wales also scored well on water sports (although within an overall low level of participation by overseas visitors) and especially "going to a live sports event", which may refer primarily to visits to Cardiff. The Welsh food experience was appreciated by overseas visitors and 67 per cent rated "dining in restaurants" in Wales – on a par with the SW of England. Wales was also seen as a strong destination for "going to the pub" and "socialising with the locals".

3.50   Research for Visit England[76] described the factors that overseas visitors are looking for from a visit to the UK. These included:

- "Most are looking for that individual experience, that hidden gem, something that is unique to themselves, perhaps something they have created, customised or even tailor-made"
- "The inbound tourist is seeking memorable experiences and moments that they can ideally share with loved ones and brag about back home", and
- "Inbound travellers talk a lot about meeting the people, seeing the country, experiencing the culture."

3.51   The research concludes that a successful destination has to offer connection on four levels of emotion; physical (what will I do?), emotional (how will I feel?), cognitive (what will I think / learn?) and human values (what is the ultimate benefit to the traveller, and where will it chime with my values?).

3.52   In conclusion, research shows that Wales has much to attract the overseas visitor and that those who experience it generally enjoy their stay. However, awareness is low and there may be an opportunity for individual operators to engage more heavily in digital promotion of what Wales has to offer.

Domestic

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[76] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/visit_britain_lb_product_report_fv.pdf

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3.53   Data from Welsh Government[77] shows a more encouraging picture amongst domestic tourists, with a 13 per cent increase in spend to £1,539m for the period January to September 2018, over the corresponding period in the previous year (against an increase of 3 per cent for Great Britain as a whole). This was made up of 8.1m overnight trips accounting for 30.1m bednights. The figure, however, remains lower than the peak reached in 2015. Encouragingly, Wales outperforms many English regions in terms of share of visitors; consistently securing 7-8 per cent of both GB trips and spend over an extended period. The survey reported especially strong growth in business visits (up almost 50 per cent on the year before) and visits to friends and relatives (a 24 per cent increased in spend over the previous year).

3.54   In addition, there were 75m recorded day visits to Wales by GB residents with a spend of £3.159m, broadly consistent with the previous year.

3.55   Latest Wales Visitor Survey data[78] (2016) shows that overall, the age profile of domestic visitors has reduced, with a growth in the proportion of 16-34 year olds and groups of friends. Wales was seen as a short-break destination by almost two-thirds of domestic visitors from within Wales and by 55 per cent of those originating in England.

3.56   Reasons for visiting Wales focused on enjoying the landscape / countryside / beaches (67 per cent), followed by historic and cultural sites (54 per cent) and sporting activities ((32 per cent). Those in the 16-34 age group were more likely than others to be visiting to take part in outdoor activities – mainly walking.

Tourism Labour Market and Education Trends

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[77] https://gov.wales/docs/statistics/2019/190307-wales-tourism-performance-january-september-2018-revised-en.pdf
[78] https://gov.wales/docs/caecd/research/2017/170308-wales-visitor-survey-2016-overseas-en.pdf

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3.57   It is important to consider the wider skills and labour market trends in Wales for the tourism and hospitality sector, to identify on a quantitative basis, the direct 'need' for a new academy.

3.58   A comparison of (domicile) location of post-16 education, reveals that in the last three years further education (FE) students in South West Wales were less likely to take subjects relating to the tourism sector[79], than students across Wales as a whole. Nonetheless, whilst take-up of these subjects as a collective fell substantially at a Wales level between 2014/5 and 2017/8 (specifically from 5.1 per cent of all learning activities to 3.5 per cent), in south west Wales during the same period, take up of tourism related subjects rose from just over 1 per cent of all learning activities to 3.5 per cent, representing a more than three-fold increase. Whilst this suggests that demand for tourism related subjects is increasing, learning supply has also increased and a tourism and hospitality academy will need to offer something different to standard FE provision.

Figure 3.3 Learning activities at further education institutions by sector subject area, and region (Wales and South West Wales)

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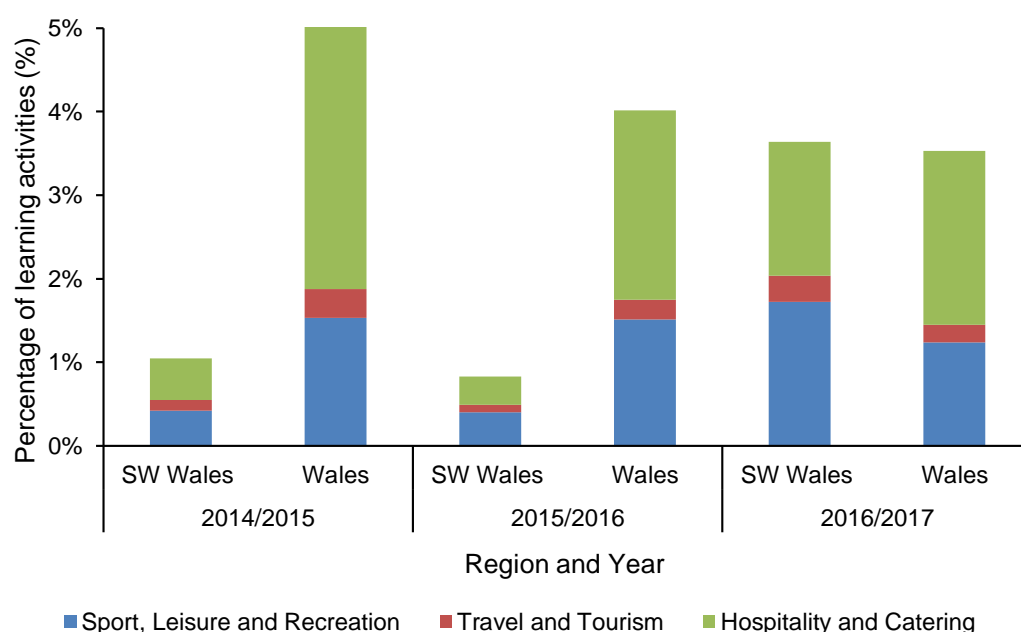
[79] Specifically, sport, leisure and recreation, travel and tourism, and hospitality and catering.

Source: Stats Wales (2018), Learning activities at further education institutions by sector subject area and unitary authority of domicile[80]

3.59 It is important to note that Figure 3.1 presents a proportion of total FE learners, which over the three academic years presented fell from 481,820 (Wales) and 117,205 (south west Wales) to 370,465 (Wales) and 84,175 (south west Wales). Thus, whilst the 'real' number of tourism and hospitality learners in south west Wales did increase during this period, it was not at the same rate as its percentage increase.

3.60 Nevertheless, a decrease in FE students as a whole may have been down to a wide range of other factors external to the tourism and hospitality sector[81]. What is notable is that the statistics suggest a trend in south west Wales contrary to Wales as a whole, in terms of the proportion of students choosing to study tourism-related subjects. Given this, a future academy will have to consider the wider provision and offer a distinct USP. Existing education providers of hospitality and tourism courses in south west Wales include:

- Swansea School of Tourism and Hospitality
- Pembrokeshire College
- University of Wales Trinity St David
- Coleg Sir Gar

3.61 Colegau Cymru has undertaken a series of interviews with tourism, retail and hospitality businesses in Wales to understand demand for particular skillsets and training. Importantly, businesses noted that highly valued skills, and those with limited provision were:[82]

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[80] Source: Stats Wales (2018), Learning activities at further education institutions by sector subject area and unitary authority of domicile
[https://statswales.gov.wales/Catalogue/Education-and-Skills/Post-16-Education-and-Training/Further-Education-and-Work-Based-Learning/Learners/Further-Education/learningactivitiesfurthereducationinstitutions-by-sectorsubjectarea-domicile]
[81] For example, an increase in take-up of A' Levels in school sixth forms, demographic changes etc.
[82] Colegau Cymru (2017) "Gammon, egg and chips in a pub night after night"
[http://www.collegeswales.ac.uk/uploads/img/Gammon%2C%20egg%20and%20chips%20in%20a%20pub%20night%20after%20night%20English%20Final.pdf]

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- Entrepreneurship education particularly to enable self-sufficiency and confidence
- Customer service and "soft" interpersonal skills
- Adequate work placements – e.g. chefs that are able to work to maximum capacity from day one
- "tailor made" training provision / courses according to business needs.

Other findings from the report include that businesses currently experience a lack of communication between higher education and FE colleges and themselves – which can limit how effectively skills gaps are addressed. [83] Importantly, the findings suggest that the academy will need to work closely with existing education providers (e.g. to signpost students) but also to ensure the offer is not duplicated.[84] Likewise, Colegau Cymru has existing networks and resources that can be utilised.

4.   Tourism and Hospitality as a Career

Introduction

4.1   Like any sector, there are both advantages and disadvantages of working in tourism and hospitality. This chapter identifies the barriers as to why tourism & hospitality are not seen as attractive career choices in the UK, unlike in many countries around the world. Chapter Five builds on these findings, to review of exemplar tourism & hospitality businesses that are helping to change the negative perceptions of the industry to make it an attractive career choice.

Enablers

Tourism is a growth industry

4.2   As cited above, the tourism and hospitality sector is one of the most competitive and innovative industries in the world, fuelled by the competition between countries and regions to attract tourists. 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 year[85]. 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. The WTTC suggests that with appropriate regulatory conditions and government support, almost 100 million new jobs could be created by 2028. The evidence therefore suggests that employment in the sector is comparatively secure.

4.3   These trends are echoed at both a UK and Wales level. Figure 4.1 illustrates the rate of employment in Industry Group I (accommodation and food services), at a Wales and UK level. Whilst the rate of employment in this industry increased between 2010/1 and 2017/8 both

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[85] 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]

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in Wales and across the whole of the UK, the rate of employment in the sector in Wales was consistently higher than in the UK as a whole. Furthermore, the proportion of people working in the sector in Wales increased more than the proportion at a UK level in that seven-year period.

Figure 4.1 Rate of Employment in Accommodation and Food Service Activities, UK and Wales
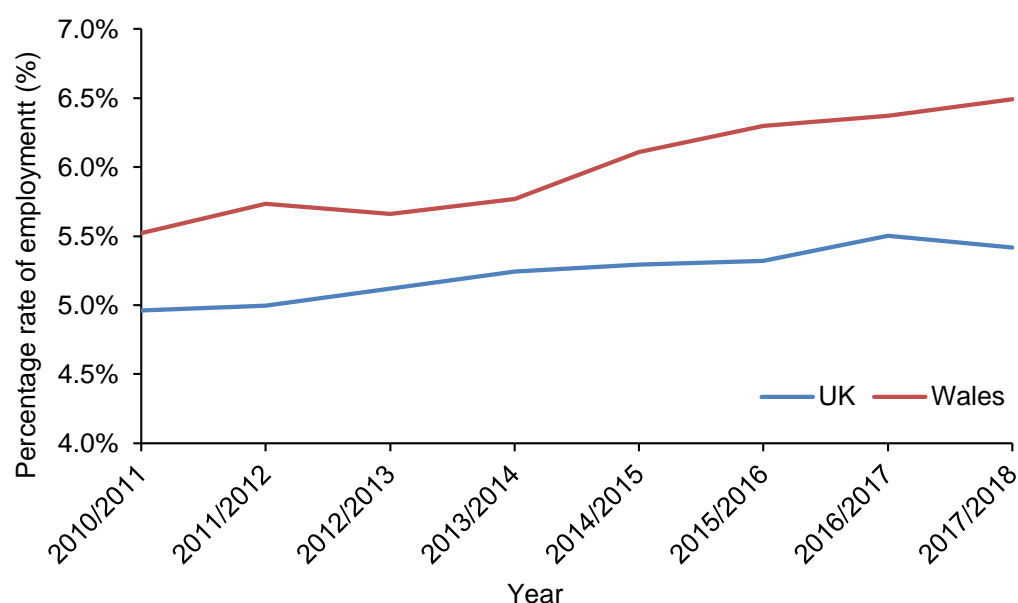
Source: Annual Population Survey, Employment by Industry[86]

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[86] Nomis (2019) Annual Population Survey – Regional – Employment by Industry [https://www.nomisweb.co.uk/query/construct/components/simpleapicomponent.aspx?menuopt=9170&subcomp=]

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Flexibility

4.4   Flexible contracts and working arrangements are appealing aspects of the tourism and hospitality sector, particularly for those with caring responsibilities, those who want to work part-time and people looking for a better work / lifestyle balance. In 2014, more than half of those working within the sector (53 per cent) in the UK were part-time[87]. 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. One example is Lime Wood's Hartnett Holder & Co restaurant[88], which introduced a three-and-a-half-day working week, with rotas drawn up three months in advance, and holidays planned a year ahead[89]. Staff are also encouraged to take a break every three months, to minimise burn out[90].

Travel opportunities

4.5   Tourism is a global industry and 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. Benefits of the Marriott Hotel qualifications scheme is that students are able to work globally within the franchise (depending on visa requirements, language skills and rights to work abroad).

Ethical and environmental influence

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[87] People 1st (2014) The skills and productivity problem – Hospitality and tourism sector. [http://www.people1st.co.uk/getattachment/Research-Insight/People-and-productivity/Report-The-Skills-and-productivity-problem-Oct-15.pdf/?lang=en-GB]
[88] Limewood Hotel, Careers [https://jobs.limewoodhotel.co.uk/careers/]
[89] With the exception of five days
[90] As cited in: https://www.thecaterer.com/articles/523445/flexible-thinking-the-employers-offering-a-better-work-life-balance

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4.6   With the growth of ethical consumerism, customers are looking for destinations and experiences that support economic prosperity, social equality and environmental and cultural protection. Working in the tourism and hospitality sector can therefore provide an opportunity to benefit communities and environments, providing personal fulfilment and greater job satisfaction.

Variety of career choices

4.7   The hospitality and tourism industry encompass many different sectors, including event planning and management, hotels, restaurants and recreational activities, offering a diversity of career opportunities to suit different interests and abilities. Employment in the sector typically involves a great deal of variety, not only in terms of the hours worked, but also the work done during those hours.

Culture, diversity and hospitality

4.8   The tourism sector attracts people from all over the world and all walks of life, both in terms of staff and customers with an emphasis on hospitality and creativity.

Regional drivers

4.9   There are some advantages of working in the sector in west Wales in particular, including comparatively low house prices and cost of living, the proximity to natural assets including the coastline and countryside and the health benefits of living in a rural area compared to a city. For example, in 2016, Pembroke was named the most desirable place to live in Wales and the sixth most desirable place to live in the UK. The town was also the least expensive place to live on the top 10 list, with an average asking price for a house at £169,969[91].

Barriers

Wage levels

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[91] https://www.walesonline.co.uk/news/wales-news/pembroke-been-named-most-desirable-12187442

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4.10   The tourism and hospitality industry is widely perceived as offering low wages and this perception is 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 18 sub-sectors hourly wages within the industry[92]. 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).

4.11   At the other end of the spectrum, the top five part-time hourly wages included; passenger air transport (£28.24), passenger rail transport, interurban transport (£23.53), urban and suburban passenger land transport (£13.12) convention and tradeshow organisers (£11.99) and libraries, archives, museums and other cultural activities (£11.65).

4.12   For comparison, the national minimum hourly wage in 2017 was £7.50 (age: 25 years and over), £7.05 (age: 21 to 24 years), £5.60 (age: 18 to 20 years) and £4.05 (age: under 18 years)[93]. Therefore, whilst the lowest paid employees in the sector earn little more than the national minimum wage, others are earning over three times the national minimum wage.

   Working hours

4.13   In 2016, the tourism industries accounted for over 14 per cent of all temporary employment in the UK[94]. Staff in temporary employment includes those in seasonal posts (e.g.: summer only), casual labour and agency and temporary workers. Approximately 50 per cent of

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[92] 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/]

[93] UK Government (2019) National Minimum Wage and National Living Wage rates [https://www.gov.uk/national-minimum-wage-rates]

[94] Specifically, 14.43 per cent. Office for National Statistics (2016) Tourism employment summaries: Characteristics of tourism industries, 2014 [https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/tourismemploymentsummaries/characteristicsoftourismindustries2014]

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employees in the industry would classify themselves as "casual" workers as the reason why they are in temporary employment[95]. Temporary employment represents ten per cent of tourism employment, and five per cent of tourism workers are not guaranteed hours, holiday pay or sick pay and therefore have an unorthodox number of hours. This can mean that they do not have a set number of hours in the week, undermining work-life balance and financial security.

4.14   Due to the 24/7 nature of many elements of the tourism and hospitality industry, conventional 9 to 5 working hours may not be available for many employees. Bar staff are working long evenings, chefs are 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 only appeal to certain individuals.

Career Progression and Education

4.15   The industry also sees individuals leave their part-time employment, in search for different career path. For 30 per cent of the industry's part-time workers this is because they are studying at the same time[96]. An example of this would be pre-university students, balancing GCSE's and AS/A-Levels with part-time work; many would then leave their jobs when they relocate to study at university elsewhere. Season patterns of working can also result from students working in holiday periods only. This can lead to high levels of staff turnover, which can impact negatively on businesses and services.

4.16   The reason for large staff turnover can therefore be a down to both supply and demand; however, both create challenges for the industry. The UK hospitality sector has a staff retention rate of 70 per cent, compared to the national average of 83 per cent across all industries[97].

[95] Office for National Statistics (2016) Tourism employment summaries: Characteristics of tourism industries, 2014
[https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/tourismemploymentsummaries/characteristicsoftourismindustries2014]
[96] *Ibid.*
[97] Deputy (2018) Retaining Britain's Hospitality Workers – How the UK can avoid a crisis in the hospitality sector.

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In practice, this means that three out of every ten workers employed in the sector will leave their role within the first 12 months. In 2018, the average tenure for staff employed was found to be only 7.5 months[98].

4.17   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 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)[99].

Demographics

4.18   Wales had the largest proportion of young workers (aged 16-29 years) in the tourism industry of compared to other UK regions (44 per cent of all workers) as of 2014 (Figure 4.2).

Figure 4.2 The age distribution of tourism works across UK regions in 2014. Taken from the ONS
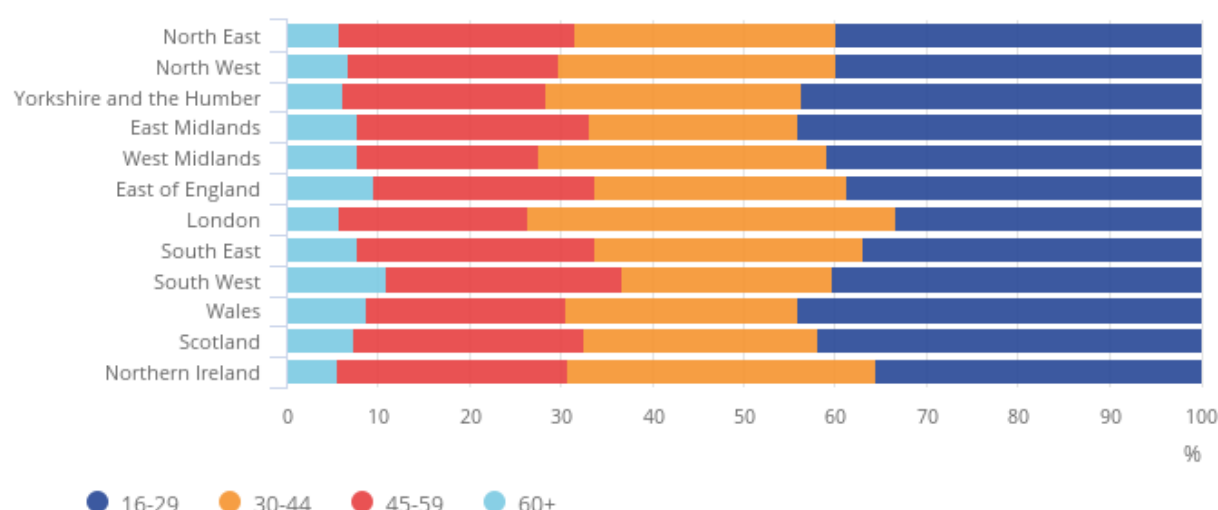
Source: Annual Population Survey (APS) – Office for National Statistics.

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

4.19   In 2014, approximately 26 per cent of tourism employees were aged between 16 to 24 years old. By comparison only 10.5 per cent of employees within non-tourism industries were aged between 16 to 24 years old in the same year[100].

4.20   Although the tourism and hospitality sector in Wales employs a high proportion of young adults, retention is still an issue as noted above, and more needs to be done in schools and colleges to promote the industry as a potential career opportunity and not just as temporary work.

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[100] Office for National Statistics (2016) Tourism employment summaries: Characteristics of tourism industries, 2014
[https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/tourismemploymentsummaries/characteristicsoftourismindustries2014]

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5.   Best Practice: Hospitality and Tourism

5.1   To inform the development of an academy in West Wales it is important to consider best practice in the industry – not just in terms of outcomes but where unique problems in the industry (including some of the issues and barriers described above) have been addressed, or in terms of unique skills delivery. This section of the report particularly focuses on identifying innovative and creative policies, programs and initiatives designed to meet the talent requirements of the tourism and hospitality sectors over the next 10-15 years.

5.2   A range of programmes from across the globe have been reviewed, in order to identify best practice. These include Hotel ICON (Hong Kong), the School of Hotel Administration (Cornell University, USA), and Ecole Hoteliere de Lausanne (Switzerland) amongst many others. See Annex A for a full list and detailed descriptions of those considered.

Admissions

5.3   Unsurprisingly, admissions to courses vary according to the prestige, content and skills level delivered by the course. As demonstrated in the case studies (see Annex A), requirements vary from:

- None
- An evidenced 'interest' in the sector or role
- Hours worked in the industry
- School qualifications (e.g. GCSEs)
- Industry qualifications
- Higher education qualifications (e.g. a bachelor's degree)
- Financial means (for example, total fees for a four-year bachelor's degree in international hospitality management at Ecole Hoteliere de Lausanne are 159,954 Swiss Francs - circa £124,300)
- Life circumstance – for example the Hotel School provides training for people who are homeless.
- The right to work / visa requirements

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- Age – to enable work experience placements to be undertaken (in line with insurance requirements etc).

5.4   The level and rigour of the admission requirements relates to how 'elite' the programme is, and associated prestige. While hours worked in the industry and qualifications can be accounted for objectively, many of the courses / institutions covered look for 'softer' skills or qualities – such as an interest in the industry and leaderships skills. A primary consideration for an academy in south west Wales will be the balance between 'softer' skills / assets, previous industry experience and existing formal qualifications in any entry requirements.

5.5   A combination of prerequisites could be considered. At Hotel ICON for example in addition to a personal statement and CV, prospective candidates go through two rounds of interviews prior to be being selected for the Elite Management Programme.[101] Furthermore, routes into the industry may vary according to the individual – and perhaps employer recommendations could also be considered. For example, someone who has already worked in a number of restaurants or hotels may be equally if not more competent than someone who has recently graduated from a catering course in FE and has formal certificates.

Logistics

5.6   A key challenge for academies and schools located in rural areas is the logistics around transport and infrastructure. This can also be an issue for placements and employment, even when the school itself is located in an urban area. Many schools attached to universities can rely on existing halls of residence. Ecole Hoteliere de Lausanne in Switzerland promotes its proximity to spectacular scenery and outdoor sports and recreation. This would be a similar asset that could be marketed by an academy in south west Wales.

Skills offer

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[101] Vault (2011) Hotel-Icon Work Integrated Education Programme – Elite Management Trainee Programme [http://www.vault.com/internship_application/hospitality/hotel-icon-limited/how-to-apply.aspx]

5.7   The skills offer at the schools included in the review varies (in terms of qualification level and prestige) although most of the long-established schools offer a formal curriculum based around key aspects of hospitality, the hotel industry and/or catering. With the exception of the Australian Apprenticeships Ambassadors Programme, none of them are marketed as schools or programmes specialising in 'tourism'.

5.8   In almost all cases, they are based around an operational hotel or restaurant, providing a combination of theoretical, class-room based learning and hands-on experience of working in the sector. This means that students 'graduate' with practical knowledge and skills in each aspect of the business operations. The practical curriculum may include national or international placements, industry visits and events (to facilitate networking) and virtual learning experiences.

Appeal

5.9   Many of the case studies summarised in Annex A market themselves on one or more unique selling points.

5.10   The Hotel School (London) provides training for 'rough sleepers' with the long term aim of providing sustainable employment opportunities and a career. The Passage charity (that helps run the course) supports students into finding accommodation. The Hotel School's appeal therefore relates to the direct outcomes for participants: a career in hospitality with the long term aim of reducing homelessness. Likewise, Fifteen provides a career path for vulnerable individuals for social benefit (e.g. reduced likelihood of reoffending).

5.11   The opportunity to travel within the industry can often be a key appeal for courses – The International Wilderness Leadership school, for example, offers visits to Alaska, Mexico and other regions as part of building up work experience placements. Similarly, the Marriot Voyage scheme is available globally and offers students a career in an international brand.

5.12   Hotel ICON's appeal lies more directly with the scope for innovation and to develop new ways to advance the sector / hotel. This is also one

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of the assets offered by Ecole Hôtelière de Lausanne, which includes an Innovation Hub (for hospitality start-ups), a Real Market Place, hosting a variety of businesses and activities, and a Hospitality Insights Blog, generating content from industry experts in business and academia. Collectively, this infrastructure facilitates the exchange of ideas and innovative thinking among students, alumni and partners worldwide.

5.13 Programmes based at universities (e.g. Oxford Brooks, Cornell and University of the Highlands and Islands) provide formal undergraduate or postgraduate degrees and market themselves as providing industry-relevant experience underpinned by robust, academic credentials. The course in Outdoor Leadership (University of the Highlands and Islands) offers the chance for students to turn their "hobby into a career" via formal, academic qualifications and work experience. Some (e.g. the Hong Kong Polytechnic University School of Hotel and Tourism Management) additionally offer PhDs related to the sector and can appeal to those considering an industry or academic career.

5.14 Interestingly, and despite how varied the level of skills on offer is among the schemes considered, all emphasise the value of access to exclusive networks, industry experts, and mentors, which is provided to students. The Hotel School for example offers students 'away days' at high-end London hotels such as The Ritz to learn from business leaders on how to run a successful business. Similarly, the Oxford School of Hospitality Management offers paid experience with industry professionals and access to the "Bacchus Society" which comprises students, alumni and friends of the school. The benefits of mentoring and networking relationships identified from the case studies include:

- Industry networks that can be used after completing a programme
- One-to-one guidance on adequate work experience placements, and jobs beyond the scheme / course
- Sharing best-practice and innovations in the industry (which can enable innovation)

- Identifying new / different opportunities for career progression and skills development
- A support network – social and psychological wellbeing is important given the demanding nature of the sector

5.15 The key 'appeal' here, is therefore evidenced career progression. As noted in the chapters above, the perception that employment in the industry is low pay and with no career progression, is a key barrier in individuals entering (or remaining) within the industry. By professionalising the industry – through qualifications, industry networks, etc students can clearly view how the course offers them future opportunities. The role of mentors and their provision of 'success stories' is clearly central here. A future 'academy' in south west Wales should therefore look at bringing in wider industry expertise to deliver the scheme.

Qualification / output

5.16 Many of the schools included as case studies offer formal qualifications, including foundation degrees, bachelor's degrees and a variety of post-graduate degrees. Many of them place emphasis on the fact that their qualification is 'industry recognised'.

5.17 Some programmes do not offer a formal qualification, on the assumption that students are experienced, and therefore already likely to have completed industry standard qualifications. The Marriott Voyage scheme for example requires students have an undergraduate degree, but graduates from the scheme are recognised within the company and are thus able to work in any of the franchises across the world.

5.18 The value of many of the programmes therefore lies more directly in:

- Industry-wide prestige
- Direct job offers upon completion
- Unique hands-on work experience (e.g. problem solving)
- Access to mentors and coaches
- Selective alumni networks

5.19   In contrast, programmes like Fifteen and Hotel School which are targeted towards low-skilled individuals states that industry recognised qualifications will be delivered as part of the course. This is to ensure employability after the programme. In the UK for example, an NVQ Level 2 Food Hygiene Certificate is necessary for all those preparing food that is sold commercially.

Outcomes and Effects

5.20   Each of the schemes outline a direct career path available for graduates, that are usually selected with guidance from a coach or mentor. The Hotel School for example works with partner businesses to ensure that successful graduates get a full-time job upon completion of a work experience placement. Likewise, students on the Marriott Voyage programme gain an entry-level management position upon completion,

5.21   More widely than career opportunities for the 'individual' the course outlines vary considerably. For example, Fifteen and The Hotel School deliver benefits to wider society, by providing employment and a career to otherwise vulnerable and disadvantaged people. Other schemes focus on longer term benefits for the industry – the long-term vision for graduates from the Hotel ICON training opportunities is that they become world leaders within the industry and able to innovate and develop new best practice.

6. Best Practice: Other Sectors

6.1 This section lists a series of case studies from other sectors which may help to inform thinking about the desired characteristics of the south west Wales Academy. This chapter reviews international best practices in terms of current and planned training opportunities – where possible reviewing how opportunities have been delivered for the 16-18 age group (Generation Z) and over 55s.

6.2 Each case study showcases a different combination of variables which shape a unique profile for that model of delivery. These include:

- The nature of the institution; a physical establishment, combination of face-to-face and online / virtual delivery or wholly online
- The curriculum; qualification driven, experiential / project-based, unitised master-classes / CPD
- Funding; industry, government, alumni or commercially priced
- The network; strength of the network created and the value of that in attracting students
- Competition; the extent to which participants compete to secure a place and the kudos that follows from that
- Governance and industry links; sponsorships, work opportunities / placements, CPD links

6.3 The portfolio of case studies will be built upon as the research progresses, to inform the design of the west Wales Academy and its associated provision.

6.4 It is likely that no single model will suit the needs of the Academy and so different aspects of provision can be used to inform delivery for different groups – including new entrants, older works and current staff.

THNK Institute: School of Creative Leadership, Amsterdam

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Overview

THNK describes itself as a "School of Practice and a School of Thought". It was set up in 2012 with the backing of the Amsterdam Government, to provide creative leadership development to entrepreneurs from across the World, with a focus on achieving social impact and addressing global challenges. Core staff are ex-McKinsey, offering formal management consultancy techniques to supplement creative approaches to leadership.

Curriculum

The core programme runs twice a year, with around 30 participants in each class. Delivery takes place over four, week-long intensive modules backed by remote coaching, project work and peer to peer coaching. A framework for leadership is taught through application in practice. Delivery is based around real-life challenges chosen at the start of the programme. Participants are also encouraged to develop their own project, either alone or in groups, to launch as a start-up. Learning is interspersed with meditation, qigong and sessions on emotional intelligence, NLP, theatre and storytelling.

There are no qualifications awarded, and "graduating" students are still known as participants.

Outreach

Many of the materials are available online, forums are filmed for sharing and taster courses can be accessed remotely. THNK has also developed satellite hubs in Vancouver and Lisbon.

Governance

There is a strong advisory board comprising global influencers from the World Economic Forum. Burning Man, Rocky Mountain Institute, Pixar, Stanford University and others. Board members contribute to forums and frequently visit the school to work with participants.

Network

One of the key strengths of the programme is the development of strong peer networks, which generally persist for several years, with (at least) annual meet-ups and commercial collaborations. The yearly THNK FSTVL provides an opportunity for all alumni to come together to share experiences and learning for a long weekend.

Funding

Participants are responsible for meeting their own costs (approx. €30,000) although there are widespread discounts of 50% for entrepreneurs and hardship grants for participants from developing countries.

MIT Media Lab

Overview

The iconic Media Lab at the Massachusetts Institute of Technology is described as "antidisciplinary", working in the space between traditional disciplines to motivate, reward and stretch participants. One faculty member described it as follows[102]:

"The Media Lab focuses on "uniqueness, impact and magic." What our students and faculty do should be unique. We shouldn't be doing

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[102] https://joi.ito.com/weblog/2014/10/02/antidisciplinar.html

something that someone else is doing. If someone else starts doing it, we should stop. Everything we do should have impact. Lastly, things should induce us to be passionate and should go beyond incremental thinking."
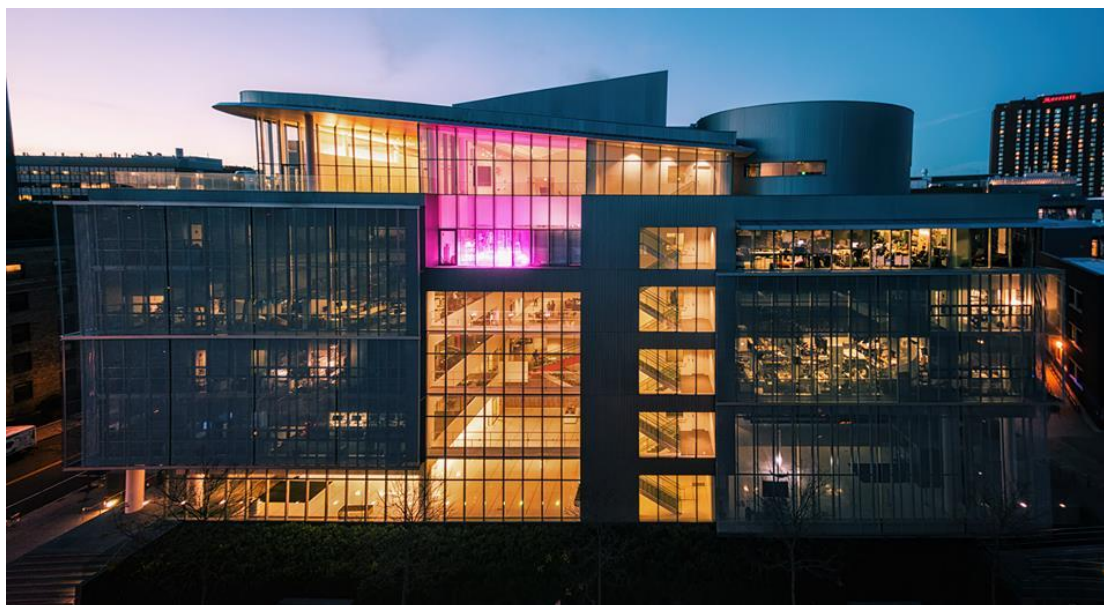
Curriculum

Courses at the Media Centre are all graduate level, awarding degrees in Media Arts and Sciences, but ranging across subject areas and focusing on themes such as human-computer interaction, communications, learning, design and entrepreneurship. Critically, the Lab operates as a community of practitioners who work together in flexible teams on challenging projects in any field that attracts them. The delivery model is predicated on dynamic collaborations across different disciplines to bring about ground-breaking advances.

Outreach

The Media Lab has corporate membership that allows varying degrees of access to IP created and to the building itself. Critically, many of the applications and technologies developed at the Media Lab are tested through the member network,

Governance

Governance sits within the wider MIT framework.

Network

Many of the past graduates have become entrepreneurs, developing start-ups in tech disciplines.

Funding

The Media Lab has a membership scheme for corporations, and this provides some $75m annually in funding.

Khan Academy[103]

Overview

6.5   The Khan Academy exists to "*provide a free, world-class education to anyone, anytime".* The Academy grew out of a small group of coaches providing online courses in a broad range of subjects for learners from early years to undergraduate level and beyond. All content is delivered exclusively online, offering learners practice exercises, instructional videos, and a personalized learning dashboard to support their progress.

Governance

6.6   A strong board of governors includes representatives of the US Education Department, Gates Foundation, financiers and practitioners. Corporate partners include 3M and Google.

Network

6.7   Although there is no official alumni network, many beneficiaries are likely to become volunteers in subsequent years.

Funding

6.8   The Academy exists on volunteers and charitable donations. Several high-profile organisations (such as the Gates Foundation and Bank of America) have each donated in excess of $10m in support.

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[103] https://www.khanacademy.org/about

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Norland College

Overview

6.9 Norland College trains students to become professional nannies at its centre in Bath. The College was established 125 year ago to provide high quality training under an elite brand.

Curriculum

6.10 Norland students are required to wear a uniform whilst studying or on placement. There is a strict code of professional responsibility and a list of expected behaviours and competences, all of which underpin a strong brand in the marketplace for Norland Nannies. Graduates, known as Norlanders, receive employment support from an agency attached to the college and can expect to earn far higher than average salaries for those working in their field.

Open university[104] OU

Overview

6.11 The Open University was established fifty years ago to meet the needs of part-time students who could not otherwise access higher education. Students can schedule their work to fit with employment, family and caring needs or any other commitments.

Curriculum

6.12 Course material is delivered through a system of blended learning (called supported open learning) which includes remote tutorials, informal study groups, online course forums and physical day or summer schools. Materials are all available online to ensure easy

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[104] http://www.open.ac.uk/about/main/

access to all students. In addition to degrees, the Open University offers apprenticeships and short courses for businesses.

Governance

6.13 The Open University is governed in line with other universities. The current chancellor is the renowned entrepreneur Baroness Martha Lane-Fox.

6.14 Students are awarded a diploma alongside a degree from the University of Gloucestershire. The BA(Hons) in early years development is delivered through a mix of academic study and practical experience working with children, including a minimum of seven placements during undergraduate study and one year's professional placement on completion of core study. In addition to childcare, students learn first aid, off-road driving and security techniques learned from military specialists. Guest speakers drawn from the graduate network are used to pass on experience of working in the field.

Network

6.15 There is an Open University Students Association, which has a membership of more than 200,000.

Funding

6.16 Finance and fees are as for other higher education institutions.

Y Prentis Shared Apprenticeships

Overview

6.17 Y Prentis coordinates a shared apprenticeship scheme for construction businesses in Wales. The scheme allows employers to take part in apprenticeship schemes even if they do not have the resource to offer a long-term job or placement. The scheme covers a wide range of trades including:

- Plumbers

- Electricians

- Plasterers

- Ground-workers

- Decorators

6.18   The board of Y Prentis comprises stakeholders from a range of organisations: from Monmouthshire County Council, Melin Homes (housing association), and Construction Industry Training Board Cymru.[105] To ensure the scheme delivers upon industry needs, an Advisory Panel comprised of construction businesses. These offer placements and provide advice about recruitment.

Businesses

6.19   Smaller businesses may not have the finance, or scope to offer an individual a long-term placement as an apprentice. This is particularly relevant for construction businesses who may not have sufficient work all year round to support a long-term apprentice. Y Prentis has a number of industry partners that they work with to deliver the scheme, including Balfour Beatty and Stephenson Group.

6.20   Because the scheme is coordinated via a central organisation and with colleges, the apprentices have a clear idea of their roles and responsibilities on site.

Apprentices

6.21   The participants will usually be students enrolled at a further education institution who need to undertake an apprenticeship to complete the course and enter employment. Formal qualifications (e.g. GCSEs) are not, however, a prerequisite. The benefit of taking part in a shared apprenticeship is that individuals get the experience of multiple businesses and roles. Students also complete the apprenticeship with industry recognised qualifications.

Outcomes

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[105] Y Prentis (2016) Business Plan [https://www.yprentis.co.uk/wp-content/uploads/2016/01/YPrentisBusinessPlan.pdf]

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6.22 Outcomes for apprenticeships include a wide range of experience (e.g. in a number of businesses) which can enable employment. Y Prentis also offers:

- Job search support
- Full framework qualifications
- Long-term understanding of the market
- Sustainable employment opportunities

Conclusions

6.23 The case studies above are intended to provide some guidance in shaping a model for a tourism academy in west Wales. Some sample characteristics are summarised below.

Figure 6.1 Sample Characteristics of Learning Delivery Models

Key: 5=strong characteristic
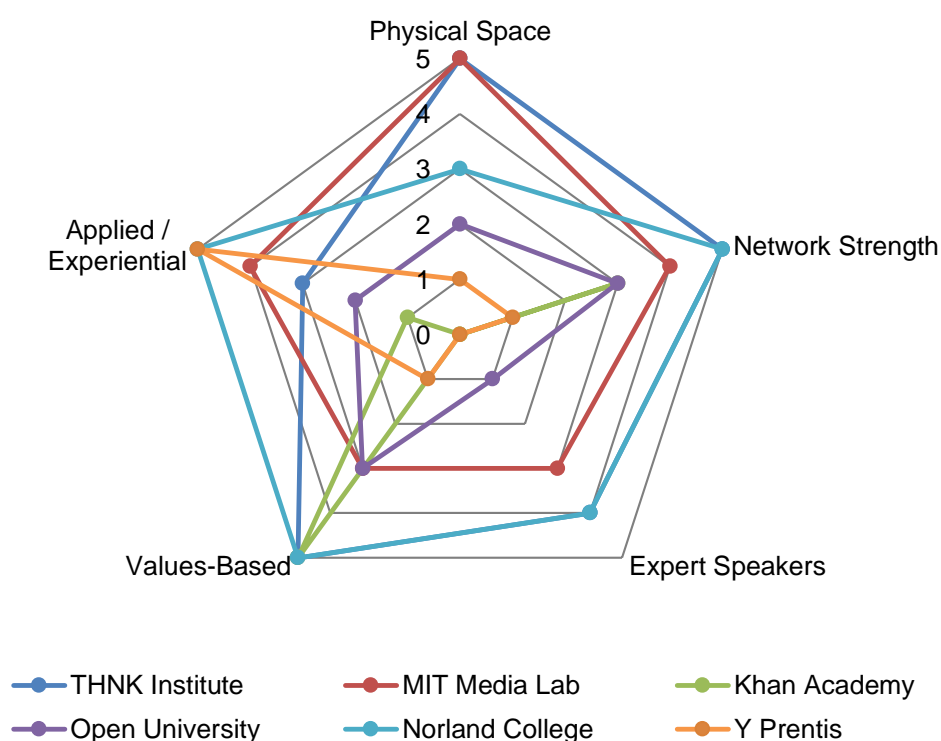
Implications

6.24   To conclude this report, the implications of the above have been
       discussed in terms of the 'opportunities' and 'threats' for an academy in
       Wales. A top-level SWOT (strengths, weaknesses, opportunities and
       threats) analysis for the industry as a whole presents the context in
       which the academy would deliver against.

6.25   The research questions and considerations for WP2 are then
       considered.

Table 7.1 SWOT Analysis of Tourism and Hospitality Sector

SWOT	Tourism and Hospitality Sector
Strengths	Outdoor Landscape Culture Heritage Sustainability Surprising Events Resilience
Weakness	Perceptions Low pay Need for staff Long / unsocial hours Underdeveloped Labour pool Transport - Geography Connectivity
Opportunities	Use technology to grow sector Offline opportunity Values based - Purpose
Threats	Brexit: overseas visitors and labour supply Technology - automation of jobs Unsustainable growth

Threats

6.26   A challenge for a tourism academy in south west Wales relates to the
       logistics of transport and accommodation, due to the rurality of the
       area. A future academy will likely need to provide on-site
       accommodation or transport links. Delivering courses via remote
       learning options (i.e. online) may also provide a way around this.

6.27   Whilst a key perception of the industry being dominated by low pay jobs may not be a reality in some cases (e.g. employees of Bluestone), it is for many of those working in the sector. By using mentors and industry experts to showcase industry progression as part of a programme, the Academy could emphasise the entrepreneurial opportunities of the tourism and hospitality sector, in a region that is not yet 'saturated' by the market. Providing work experience placements and direct routes to career entry into high profile employers with rapid career progression may also help overcome this issue. The uncertainty surrounding Brexit has implications on all sectors in terms of supply chains, access to labour, and wider economic disruption. Furthermore, the implications of ending 'free movement' between the EU and the UK may result in a decline of foreign visitors – depending on the outcomes of the negotiations. Although these outcomes are as yet unknown there are several steps that the academy could take to minimise disruption and even benefit from the political changes. These could include:

- Reviewing and responding to domestic tourism trends and adapting the 'offer' accordingly
- Partnering with a hotel school within the EU (e.g. offering exchanges)
- Educating students on the benefits of local supply chains and sharing best practice from local businesses

6.28   A global trend that will affect almost all sectors will be further developments in automation and industry 4.0 and the changes this will make to the nature of employment. It is predicted that a number of low-skilled jobs in administration will be replaced by automated systems. Furthermore, 'big data' analytics effects marketing, outreach and the design of tourism experiences. The future academy will need to enable students to take advantage of data analytics etc and provide the required training.

6.29   Although a 'strength' as well as 'threat', the existing provision of tourism and hospitality training in Wales means that a future academy needs to remain distinct from the existing offer. Furthermore, there is a risk that

the new academy is seen in competition with existing provision rather than in partnership. The academy will need to work closely with existing institutions, for example via the regional skills partnerships to ensure complementary delivery. For example, the academy could recruit students in a similar way to the Hotel Icon Elite Management Programme, where high achievers on previous programmes are selected to apply.

Opportunities

6.30   A key 'strength' of the offer in Wales relates to the natural landscape and outdoor / adventure sports as a 'pull' factor for prospective staff interested in a dynamic work-live balance in the tourism and hospitality sector. A future training 'academy' could embed this appeal into its design – in terms of its aesthetic and offer (e.g. benefits could include access to a surf school or mountain biking). Therefore, the adventure aspect of Welsh tourism may act as a significant 'enabler' to working within the industry – if (particularly young) people who value the outdoors are provided with the opportunity enjoy outdoor pursuits during their time off.

6.31   Promoting the outdoor and adventure sports appeal of the area would also have implications for the curriculum in the academy, and in this way a programme in south west Wales could diverge from some of the more traditional hospitality schools reviewed as part of this work programme.

6.32   Many of today's tourists are placing value on sustainability and authentic local experiences. This has implications for a tourism and hospitality academy that would need to develop students with specific knowledge of local supply chains as well as generic understanding of the need to demonstrate local social benefits, environmental conscientiousness and cultural authenticity.

6.33   A key strength of the tourism and hospitality sector in south west Wales is the number of existing entrepreneurial 'success stories' along with opportunities for further business development. Whilst many of the

renowned schools prepare students for work in the corporate hospitality world, an academy in south west Wales could focus on innovation and business start-ups.

6.34   Furthermore, the number of events across Wales (festivals, sporting events, etc) provides opportunities for students interested in event management and / or developing businesses that capitalise upon high profile events regularly taking place in these areas. As stated in earlier chapters, a key asset of training schemes is the availability of diverse networks and mentoring opportunities; the plethora of real life 'success' stories in the area would enable the 'academy' to link with existing businesses to provide shared apprenticeships and / or experiential learning opportunities.

6.35   Language, heritage and culture can be a significant "pull" for tourists into Wales, particularly given trends towards 'unique' experiences and authenticity. Preparing students to have an understanding of the local culture (including the Welsh language) could equip them with invaluable skills for future business start-ups or for working in and around existing attractions and events. Despite the 'threat' of new technological developments on tourism jobs, there is an opportunity for Wales to emerge as a leader – setting, rather than responding to new trends. Primarily, the use of personal data and specifically tailored ad campaigns for different demographics or 'tribes' will be central going forward as online / digital platforms become the main form of media that customers engage with. The Welsh tourism sector therefore needs to incorporate such technology and skillsets to enable progression at the forefront of industry developments – setting, rather than responding to industry trends. Furthermore, design to ensure that the aesthetic of tailored advertising campaigns will require specific skill sets.

6.36   A key opportunity as outlined in some of the case studies, is for the academy to build upon the existing talent pool within Wales. It will need to offer a different set of skills and experiences from that on offer. Opportunities include:

- Development of an entrepreneurship 'hub' and routes to market for new products / processes developed by students
- Networking and knowledge sharing with industry bodies
- Experiential learning, based on problem solving and real-world experiences
- Offering work experience / internships that cover all aspects of the industry (such as through rotations, or shared apprenticeship schemes.

Research Implications for Work Package Two

6.37 This report has outlined the key state of the sector, and how a future tourism academy may respond to existing trends, and future opportunities. The case studies considered collectively above and presented in more detail in Annex A highlight areas of research needed for the next work package to be tested with the industry and shaped into more concrete proposals.

6.38 The first aspect to consider will be mode of delivery itself – whether the provision should be delivered online, via existing tourism and hospitality businesses, or in a physical space. It is likely that the proposal will include a mixture of these elements, but questions for WP2 include:

- What type of online resources should be available?
- Should online resources only be available for students?
- Which businesses should the school partner with?
- How can training placements 'differ' from existing apprenticeships schemes?

6.39 Related to the space itself, a second area to consider will be the curriculum and qualification on offer. As discussed, the scope of skills provision differs depending on the direct outcome associated with the school. For example, if the primary outcome is employment, the school / course tends to work directly with employers to offer placements and provide nationally recognised qualifications. On the other hand, the

more 'elite' schools may offer associated prestige, with the direct outcomes stemming from association with esteemed alumni and connections to industry leaders. Questions to consider going forward as part of WP2 therefore relate to the outcomes for:

- students – e.g. an industry recognised qualification, problem solving / experiential learning, entry level employment, managerial positions, etc.
- businesses – specific skills gaps:
  – How do we ensure labour and skills supply for the next decade?
  – How do we upskill our existing staff to meet the needs and expectations of new and potential visitors?
  – How do we draw on new sources of skills and labour (older people and returners) by offering attractive lifestyle packages?
- society and economy– such as local / rural economic growth, local skills, social mobility.
  – How do we use the assets of the region to attract new people?

6.40 A further consideration will relate to admissions, which will be directly related to the type of qualification / learning experience on offer. Given the range of ways in which individuals enter the industry it will be important to consider:

- Number of hours worked in the sector
- Basic qualifications (e.g. GCSEs in Maths and English)
- Higher education (undergraduate degrees, college-level qualifications)
- Recommendations from employers / tutors
- Future ambitions

All of these questions will need to be considered a part of WP 2.

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Annex A Tourism and Hospitality Academy Case Studies

Hotel ICON: Elite Management Programme

Hotel ICON is located in the busy Tsim Sha Tsui area of Hong Kong. It is a premium hotel owned by Hong Kong Polytechnic University School of Hotel and Tourism Management (SHTM), as a means to provide training for students alongside research to improve and innovate their customer offer.

Admissions

The Elite Management Programme is open to the six "most talented" students within SHTM. The course requires a 3.0 GPA or above, and experience (400 hours) of working in the hospitality industry before joining. [106] Importantly the admissions request potential students "show strong eagerness to become future leaders in the hospitality industry."[107] Recruitment takes a number of steps, including two rounds of interviews.[108]

Skills Offer

The SHTM provides a series of qualifications – from internships through to PhDs, which involve placement in Hotel ICON. The "Elite Management Programme" recruits from within the university and offers an intense 11-month programme. Phase 1 (16 weeks) comprises a rotation around all major areas of the hotel. Students complete weekly tasks, with regular assessments. In Phase 2 (32 weeks), students shadow / mirror a manager in one of three hotel divisions (rooms, food and beverage, or administration).[109]

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[106] Vault (2011) Hotel-Icon Work Integrated Education Programme – Elite Management Trainee Programme [http://www.vault.com/internship_application/hospitality/hotel-icon-limited/how-to-apply.aspx]
[107] Hotel ICON Elite Management Programme
[http://hotelschool.shtm.polyu.edu.hk/eng/emp/emp_info.pdf]
[108] Vault (2011) Hotel-Icon Work Integrated Education Programme – Elite Management Trainee Programme [http://www.vault.com/internship_application/hospitality/hotel-icon-limited/how-to-apply.aspx]
[109] Hotel ICON Elite Management Programme
[http://hotelschool.shtm.polyu.edu.hk/eng/emp/emp_info.pdf]

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Facilities

The hotel and the university are integrated – based on the same site but with different entrances, and some shared spaces. For example, meeting rooms are often used as classrooms.[110] As per the nature of the course, students have access to a fully functioning hotel in which to work and complete their qualification. Furthermore, the hotel has three 'experimental' rooms where products and processes can be piloted on visitors (e.g. design features).[111]

Outcomes

Upon completion of the Elite Management Programme, students attain a certificate as proof of their achievement. Due to the selective nature of the scheme and the experience garnered, the scheme has a high level of prestige.

Cultural relevance

A key aspect of the cultural appeal of Hotel ICON is the willingness of the brand to innovate and test new products / processes on its consumers. Recent developments include a free smartphone for guests to use during their stay – with data and social media shortcuts pre-loaded onto the phone. As well as enabling guests to avoid roaming fees, the Hotel found that their social media mentions and trip advisor engagements increased.[112] Other innovations include the hotel has gone paper-free to reduce their carbon impact, and there is a free mini bar in all rooms. Academics are able to use the hotel to run 'investigations' to inform industry best practice. Studies include 'How can hotels better involve frontline employees and middle managers in their competitive intelligence activities?' and 'Willingness to pay for an upscale hotel restaurant menu price according to hedonic variables".[113]

[110] The Caterer (2016) Brits Abroad: Richard Hatter
[https://www.thecaterer.com/articles/364282/brits-abroad-richard-hatter]
[111] Back to School at Honk Kong's New Learning Hotel (2011)
[https://www.huffpost.com/entry/its-backtoschool-at-hotel_b_949979]
[112] Levy, M. for Traveller (2015) Hotel Icon Hong Kong has Own University Attached
[http://www.traveller.com.au/hotel-icon-hong-kong-has-own-university-attached-1mk330]
[113] School of Hotel and Tourism Management Research Projects Implemented / To Be Implemented in Hotel ICON (2017) https://www.hotel-icon.com/public/PolyU-Research-Project.pdf

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The hotel boasts a young staff – the average age of those in non-managerial positions is 23. Aesthetically, Hotel Icon has ensured it looks stylish and relevant with the interior and uniforms designed by prominent architects and fashion creatives.[114]

Hotel School London

The Hotel School provides training in hospitality, to vulnerable and homeless people. It is delivered as a joint collaboration between The Goring Hotel and The Passage – a voluntary sector homeless resource centre. It is also supported by over 50 local businesses, a number of Five Star London hotels, and Westminster Kingsway catering school.[115]

Admissions

Rather than an admissions process in which potential students apply and are selected, referrals are made from external organisations that work with homeless people (e.g. The Passage). Individuals are also welcome to apply through the website. There are no requirements other than an interest in hospitality.

Skills Offer

The course is eleven weeks long. The first week comprises an introduction and overview of the industry, with the aim to 'inspire' students. The week includes talks from former rough-sleepers who have developed a career in the industry. The second stage is a 10-week course which covers all areas of hospitality: service, reception, kitchen and housekeeping. Alongside work experience, the students go on industry visits (e.g. to The Ritz), observe culinary / cocktail demos and attend industry events.[116]

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[114] South China Morning Post (2018) A Hong Kong tourism success story: teaching hotel the industry derided has spearheaded change and earned a top ranking [https://www.scmp.com/lifestyle/travel-leisure/article/2137134/hong-kong-tourism-success-story-teaching-hotel-industry]

[115] Hotel School [https://www.hotelschool.org.uk/]

[116] The Hotel School – Course Highlights [https://www.hotelschool.org.uk/teaching]

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Facilities

The training is a mix of classroom lessons and in-work placements. The key asset of the scheme is the network of businesses and individuals involved – which includes Michelin starred chefs, and five-star hotels.

Outcomes

Alongside employment, the student qualifies with national certificates recognised by the industry. Upon completion of the course, the students take part in a work placement with a partner business, prior to full-time employment. The individual is also assigned a mentor and work-buddy to help with progression after the course has finished. The school currently delivers approximately 24 full time employees per year but aims to reach 120 alumni in full time work after the project has closed.

Marriott Hotel: Voyage Global Leadership Development Programme

First established in 1927, the Marriott Hotel company spreads over 127 countries, with more than 6,700 properties and 30 sub-brands.[117] The company is recognised globally and offers various point schemes and membership options to encourage footfall all year round (e.g. with business travellers). The Voyage Global Leadership Development Programme is targeted towards post-graduate students and lasts 12 – 18 months.

Admissions

The programme is offered across the globe – and postings are advertised internationally. A key requirement relates to visas and work authorisation: students are able to participate in Voyage in a country different to where they have citizenship, as long as they are able to work. Specific qualifications required may differ according to the placement, but include:[118]

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[117] Marriott Hotel (2019) About Marriott [https://www.marriott.co.uk/marriott/aboutmarriott.mi]
[118] Marriott Careers (2019) Costa Rica – Voyage Program – Food and Beverage [https://marriott.taleo.net/careersection/4/jobdetail.ftl?job=19000FTE&tz=GMT%2B00%3A00& tzname=Europe%2FLondon&tux.apply]

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- Language proficiency

- Bachelor's degree or equivalent higher education

- Critical thinking and communication skills

- Ability to self-manage and be a self-starter

- Desire for personal and professional growth

Skills Offer

The Voyage programme offers students the ability to specialise in a wide range of areas including accounting and finance, culinary, human resources, rooms operations, and event planning. Students are also given a short rotation of all areas of a hotel, so they gain an overall understanding of how the business is ran. The scheme enables students to: cultivate customer relationships, be a champion for innovation, manage people, improve processes, pitch new initiatives, take on special projects. Emphasis is placed on problem-solving and innovation.[119]

Facilities

A primary asset of the scheme is that participants have access to mentors and senior managers within the company, to provide support and specialist insight throughout the programme. Students also have access to the Voyage Virtual Hotel Simulator which enables students to test their knowledge about the industry, through practice situations in which they have to make decisions.

Outcomes

The programme does not offer a formal qualification; however, it is designed to provide students for an entry-level management position upon completion of the scheme. An appropriate role going forward is selected through each students' coach and champion.

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[119] Marriott Careers (2019) Costa Rica – Voyage Program – Food and Beverage [https://marriott.taleo.net/careersection/4/jobdetail.ftl?job=19000FTE&tz=GMT%2B00%3A00&tzname=Europe%2FLondon&tux.apply]

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The Edge Hotel School, UK

The Edge Hotel School offers a ground-breaking experience of hospitality education based at the refurbished 4-star Wivenhoe House Hotel on the University of Essex, Colchester Campus. It offers industry-led hospitality and events management degrees and foundation degrees that prepare students to graduate as the future leaders of the hospitality industry in a real live working hotel. It stands alone in the UK as undergraduates at the Edge learn by doing the basis of their degree qualifications whilst also learning the all-important people skills essential for success in the hospitality industry.

Admissions

Prospective students apply through UCAS or via the Edge application form. Students are selected on the basis of previous academic credentials (between 64 and 96 UCAS points) and a personal statement.

Fees are in line with standard University of Essex degree qualifications.

Skills Offer

The Edge offers a combination of three-year BA and shorter, intensive Foundation degree programmes in the following areas:

- Hotel Management
- Events Management
- Hospitality Management
- Events Management with Hospitality

The programmes, some of which include options to study abroad, are designed to reflect the realities of life in the hospitality industry, in order to make graduates more employable. The initiative is widely supported by leaders in the hospitality industry who have also been involved in the development of the curriculum.

Facilities

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The Hotel itself provides forty guest bedrooms, some of which are sponsored by industry partners and set out in their house style. Other facilities include relaxed dining in a contemporary brasserie setting, afternoon teas, conferences spaces and a full wedding service.

Outcomes

In addition to gaining a formalised qualification in hospitality, students at the Edge Hotel school benefit from close links to key players in the industry, including the Ritz London, Red Carnation Hotels, Moet Hennessey, Hilton Worldwide and Marriot, amongst others. The Edge website addresses prospective students with the following statement: *"If you don't want to be spoon-fed a degree, if you want to gain the real experience you need to succeed, if you want to make the industry connections and get ahead, welcome home."*[120]

Ecole Hôtelière de Lausanne, Switzerland

Rooted in the Swiss sense of hospitality Ecole hôtelière de Lausanne (EHL) has, since 1893, been one of the pioneers of education that has inspired the world of hospitality and created a unique professional community of 25,000 global industry executives who share the same values based on EHL's distinctive heritage. As one of the world's premier references in hospitality management, EHL offers university-level studies to talented and ambitious students who are aiming for top careers in the international hospitality industry. Consistently top ranked, EHL has world-class faculty and ultra-modern campus facilities to some 2,000 students from close to 90 countries.

Admissions

Prospective students apply through the EHL application portal. English proficiency is an entry requirement at EHL. Minimum academic entry requirements from British students are BBC at A-Level and candidates must

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[120] https://www.essex.ac.uk/departments/edge-hotel-school

also submit an essay of between 500 and 650 words on one of three topics set by EHL.

Particular qualities sought from applicants include:

- Academic aptitude for critical thinking and creativity
- Interpersonal skills for management and leadership roles
- Motivation and service mindset
- International outlook and language skills.

The total fees for a four-year bachelor's degree in international hospitality management are 159,954 Swiss francs (circa £124,300); this includes academic tuition, access to infrastructure and facilities and food and drink, but not accommodation, utilities, health insurance and parking.

Skills Offer

EHL offers Hospitality Management Degrees at a range of different levels (Bachelor's, Master's, MBA (80% online) and Executive MBA, alongside a range of short programmes, including a five-month Culinary & Restaurant Management Certificate[121], a variety of Online Hospitality Certificates[122] and the EHL Junior Academy, which offer students ages 16-18 who are considering a hospitality career path a one-week programme providing insight into the hospitality industry and the hospitality bachelor's degree.

Facilities

EHL infrastructure to support innovation and development in the hospitality industry include an Innovation Hub (for hospitality start-ups), a Real Market Place, hosting a variety of businesses and activities, and a Hospitality Insights Blog, generating content from industry experts in business and academia. Collectively, this infrastructure facilitates the exchange of ideas and innovative thinking among students, alumni and partners worldwide.

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[121] This involves 25 workshops with industry renowned experts.
[122] Including Driving Hotel Revenues, Mastering Hotel Financials, Hotel Development and Real Estate Investment.

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Outcomes

In addition to a formal degree or certificate, students become part of the Alumni of EHL network, a unique community of hospitality professionals and entrepreneurs worldwide. The EHL has 25,000 alumni from 150 countries located in five continents; more than 300 AEHL events and gatherings take place every year.

Cornell University - School of Hotel Administration, USA

Founded in 1922, Cornell University's School of Hotel Administration (colloquially known as SHA) was the first collegiate programme in hospitality management. As the only Ivy League programme in hospitality management, the school offers a curriculum that addresses all of the aspects of running a hotel business - strategizing and planning, design and construction, financing and marketing, as well as management and operations.

Admissions

Students apply to the school in the same way that students apply to any higher education programme in the USA and the school places the same value on academic credentials as the rest of Cornell University; however, 85% of undergraduates at SHA have hospitality experience before starting their programme, and the school strongly recommends that students gain industry experience before applying: "Work experience will give you a better understanding of the industry and provide you with background knowledge to bring into our program."[123]

Fees are in line with other programmes offered by Cornell; estimated tuition and fees for 2018-9 range from $36,798 to $54,818, whilst housing, dining and health-related expenses are $15,136. There are, however, a number of grants, loans and work opportunities that can help to off-set some or all of these costs.

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[123] https://sha.cornell.edu/admissions-programs/undergraduate/how-to-apply/faq.html#work-experience

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Skills Offer

The SHA offers business degrees at bachelor's, master's and PhD level. In addition to a core hospitality curriculum, students can choose elective courses from any of the 4,000+ course offered throughout Cornell University. The core curriculum covers finance and accounting, HR, marketing, tourism and strategy, food and beverage management and law, amongst many other subjects.

Facilities

In addition to the main curriculum, students at SHA are able to study abroad for a period of time, participate in a one-semester Management Intern Programme, take up a paid position at the on-site Statler Hotel as part of the Hotel Leadership Development Programme and simultaneously complete an associate's degree at the Culinary Institute of America (CIA) in order to acquire qualifications in both business (from the SHA) and culinary arts (from the CIA)

Outcomes

Students gain a degree as well as becoming a member of the SHA alumni. Regional alumni club events, an alumni directory, a mentorship platform offering the opportunity to engage with hospitality leaders and a career management centre to help connect alumni with internships and graduate posts all support SHA alumni (known as 'Hotelies') to further their careers in the hospitality sector.

Oxford School of Hospitality Management, Oxford Brookes University, United Kingdom

The Oxford Brookes University International Hospitality Management course is run by The Oxford School of Hospitality Management, which has an international reputation as one of the principal providers of management education in its field. Student programmes include placements at some of the

top hotels and restaurants in the UK and postgraduate provision includes MSc degrees in International hotel and tourism management. The School also co-ordinates the Oxford Gastronomica; a virtual network of institutions with an interest in the culture of food and wine and including partners in Burgundy and Transylvania.

Admissions

For students applying to the university courses there are specific academic requirements. The majority will require GCSE maths and English at grade C or above and A-Levels. However, part-time holiday work and industry experience is not necessary but noted as advantageous.

Skills Offer

Summary of training delivery: modules, experiential, in-work training. The courses offered at the university are varied from undergraduate to post graduate degrees. Many courses are mentored by industry professionals and opportunity to apply learning to real-life situations. The students have the option for a year in industry work placement. The work placements offer, paid full-time work experience at highly regarded hospitality employers, not just in the UK but in the USA and China[124].

Facilities

As part of the Oxford School of Hospitality Management, it includes an award-winning restaurant, the Brookes Restaurant[125]. The restaurant offers an opportunity for students to have real-life experience in a high standard restaurant, working alongside professional staff helping to develop the students' education. The restaurant also offers a wide range of specialist hospitality courses and team building experiences from the cookery and wine

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[124] Oxford Brookes University (2019) The Oxford School of Hospitality Management[https://static.brookes.ac.uk/hospitality/brochures/undergraduate/]
[125] Oxford Brookes University (2019) Brookes Restaurant [https://www.brookes.ac.uk/restaurant/]

school. Not just for students but offered externally to adults and children, accessible for all levels of ability[126].

Outcomes

Students gain degree level qualifications, including a range of real-life experiences and knowledge. Through work placements, students gain valuable links to the industry. Students are also encouraged to join the Bacchus Society. The society includes a variety of current students, alumni and friends of the school. This creates a connected community, an advantage within the industry in establishing a relationship and building a network with others in the industry.

Jamie Oliver's Fifteen, United Kingdom

Famous chef Jamie Oliver established the London Fifteen restaurant in 2002. The restaurant's aim was to get unemployed young people into the hospitality industry, training individuals by working alongside a team of professional chefs and mentors. Originally it recruited 15 young apprentices, and today the apprenticeship program continues developing young passionate individuals. It has developed more than 500 apprentices worldwide, including Michelin star chefs[127].

Admissions

All Jamie Oliver's restaurants offer the opportunity for individuals to apply for apprenticeships at the highly regarded restaurants. They are very competitive and advertised online via the Jamie Oliver Restaurant Group careers website[128].

Skills Offer

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[126] Brookes Restaurant Cookery & Wine School
[https://static.brookes.ac.uk/restaurant/CookeryWineSchoolBrochure/]
[127] FIFTEEN (2019) [https://www.fifteen.net/welcome-to-fifteen/]
[128] Jamie Oliver Restaurant Group: Jamie Oliver Restaurant Group Careers (2019)
[https://www.jamieolivercareers.com/]

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Due to on site experience, training with teams of professional chefs and mentors; the apprentices acquire real life industry experience and skills. The restaurants have specialised menu's and individuals learn unique creative food techniques, along with working in a fast-paced city restaurant. This opportunity for unemployed young people can have a major impact on their career prospects and transform their lives.

Outcomes

The main outcome for young people completing an apprenticeship program at Jamie Oliver's restaurants is that it is internationally recognised. Future employers in the industry recognise the achievement of completing a highly regarded apprenticeship at the celebrity restaurants. That along with the high standard of training and experience acquired allows a unique pathway into the industry.

Australian Apprenticeships Ambassadors Program, Australia

Program Summary

In an effort to change perceptions of apprenticeships and vocational training in Australia, the Australian Apprenticeship Ambassadors Program was established in 2013. The program has been recognised by the United Nations Educational, Scientific and Cultural Organisation and International Centre for Technical and Vocational Education and Training (UNESCO-UNEVOC) as a promising practice[129].

"The program recruits prominent figures and high-performing former apprentices as ambassadors, then organizes events and business forums where ambassadors showcase the apprenticeship system. An online platform increases the programme's outreach, sharing success stories about former apprentices and enabling the public to invite ambassadors to their

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[129] UNESCO-UNEVOC (2017) Promising Practice: The Australian Apprenticeships Ambassadors Program [https://unevoc.unesco.org/go.php?q=PP_Ambassador]

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local events. As of 2017, the programme has reached 6 million people across Australia" [130].

Relevance

Australia's tourism and hospitality industry showcases similarities to that of Wales'. The industry is faced with skills shortage in the coming years and employment options also have the perception of low pay and ad-hoc working hours. The industry identified the need for a role in promoting the appeal of VET (Vocational Education and Training) as a valued career pathway. For the industry, majority of employees are employed with VET qualifications. The Tourism Training Australia National Skills Summit in 2018 identified the benefits the program had in encouraging more students to study for VET qualifications and entering the industry; however, there was still a need to encourage more students to acquire VET qualifications in key industries[131].

Outcomes

The program coupled with initiatives such as "real skills for real careers" which showcases and promotes a diverse range of rewarding careers via VET. With interesting marketing and communication techniques featuring individuals broadcasting their success stories via various media platforms[132]. The program highlights interesting marketing and communication strategies that the potential new academy could adopt.

The International Wilderness Leadership School, USA[133]

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[130] UNESCO-UNEVOC (2017) Promising Practice: The Australian Apprenticeships Ambassadors Program [https://unevoc.unesco.org/go.php?q=PP_Ambassador]
[131] Tourism Training Australia (2018) 2018 National Skills Summit Report [https://static1.squarespace.com/static/5afd0eefb27e3965eeb362ff/t/5c58bf56652dea0e904d7f79/1549320023930/TTA056_2018_Summit_Overview_AW.pdf]
[132] Busy At Work (2017) Adopt the real skills for real careers tagline on your communications [https://www.busyatwork.com.au/lp/vet-real-skills-real-careers/]

[133] http://iwls.com/?gclid=EAIaIQobChMI-

4nFt9jv4AIV6BbTCh2Kag0TEAAYAiAAEgIVcvD_BwE

Programme Summary

The International Wilderness Leadership School specialises in training guides and leaders to work in remote outdoor situations with groups of people. Content is accredited via the Association for Experiential Education[134] and qualify for US college credits. The emphasis of delivery is on experiential learning and teaching in remote landscapes and on expeditions. The one-year programme will include visits to Alaska, Utah, Mexico and other destinations to provide experience in a variety of conditions and landscapes. Over the course of a year, students develop substantial technical skill and gain leadership experience, preparing them to be professional leaders or guides in several disciplines.

Admissions

The School is run as a purely commercial operation and has no entry requirements, although the number of places on a given course is said to be limited.

Financing

Each module is individually priced, with costs of around $4000-$6000 per 24-day unit.

Facilities

All teaching is conducted in the field with staff to students rations of 1:3.

Values

The programme supports strong environmental values, with a wide range of affiliations to environmental groups globally. Free courses are offered to local people in Tanzania and Nepal and students are taught environmental and social values.

Relevance

The School sits outside mainstream education and operates by selling adventure, environmental values and the prospect of working in the outdoor

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[134] https://www.aee.org/

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adventure industry in return for commercial fees. It could be said to fill a gap in college-based provision.

Outcomes

The programme claims good employment outcomes for its students, although no detailed data is available beyond quotes from former students.

Outdoor Leadership, University of the Highlands and Islands; West Highlands College, Scotland[135]

Programme Summary

This leadership course is aimed at those wanting to turn their hobby into a career, or who have a particular interest in outdoor challenges. The School of Adventure Studies provides a range of courses linked to outdoor education and leadership, including degree courses in adventure tourism management and adventure education.

Admissions

Students have to be aged 18 by the 1st April in their year of study, to enable them to take on work experience. Academic qualifications at Scottish Standard Grade (GCSE A or B equivalent) are required, or a Certificate in Outdoor Adventure course.

Financing

Most students have their fees paid as this is a full-time accredited course.

Facilities

The College is based in Fort William and the course runs four days a week from there from September to Easter, after which students undertake one term's work experience.

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[135] *https://www.whc.uhi.ac.uk/courses/outdoor-leadership/*

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Skills Offer

Course content covers a range of skills linked to leadership and outdoor activities, and also include standalone professional awards in specific disciplines, such as canoeing, mountain bike leadership and climbing wall training.

Relevance

There is currently a gap in experiential outdoor leadership training in Wales, and this course provides an example of what might be offered.

Event Academy, London[136]

Programme Summary

The Event Academy offers a range of courses designed to support those wishing to enter the events management industry. Courses are a mix of class-based and experiential learning, with strong links to leading agencies, venues and clients; the Academy aims to use "London as its classroom" and is based in the Design Centre, Islington – itself a major events venue.

Admissions

Courses are open to anyone with an interest in the industry.

Financing

Courses cost from £45 for a basic masterclass to £7,650 for a six-month postgraduate diploma including a three-month work placement.

Skills Offer

The Academy offers a wide range of on and offline learning, including:

- Full-time courses from foundation to postgraduate diploma
- Online versions of the above
- One-off masterclasses

Courses are accredited by the Chartered Institute of Marketing.

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Relevance

The Academy provides a commercial model for delivering learning for an industry with local strengths.

Outcomes

The Academy claims that 90 per cent of students are working in the industry one year after graduation. There is an alumni network of more than 2,000 past participants.