

MILLER

Research Evaluation Consulting



bluestone
national park resort



www.arwainsirbenfro.co.uk ● [@arwainsirbenfro](https://www.facebook.com/Pembrokeshire2020/) ● [facebook.com/Pembrokeshire2020/](https://www.facebook.com/Pembrokeshire2020/)

Tourism and Hospitality Training Academy

Work Programme 2 – Options

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

April 2019

Tourism and Hospitality Training Academy: Work Programme 2 - Options

Miller Research (UK) Ltd.



For further information please contact:

Jenny McConnel

jenny@miller-research.co.uk

Table of contents

Executive Summary.....	i
1. Introduction/Background	1
2. Methodology	2
3. Wales: Product and Project Development	5
4. Education and Training Offer	28
5. Virtual Learning Environments	42
6. A Sustainable Tourism Academy	52
7. Summary and Way Forward.....	73

List of tables

Table 4.1: HE and FE institutions in Wales, offering tourism and hospitality related educational courses.	28
Table 4.2: The sub sector breakdown of courses delivered at HE and FE intuitions.....	32
Table 4.3: Learning programmes for all apprenticeships divided by sector against academic year	35

List of figures

Figure 2.1: Approach to WP2.....	2
Figure 3.1: Percentage Year on Year Change in Tourism Business Counts, UK and Wales	6
Figure 3.2: Year on Year Percentage Change in Business Counts for the Tourism Industry, by Two Digit SIC Code in Wales	7
Figure 3.3: Percentages of businesses against the business size, UK and Wales.....	8
Figure 3.4 Tourism Businesses in UK and Wales, percentage according to turnover (£1,000)	9
Figure 3.5 Tourism Business Births in Wales and UK as a Percentage of Total Business Births, 2013-2017.	10
Figure 3.6 Tourism Business Deaths in Wales and UK as a Percentage of Total Business Deaths, 2013-2017	11
Figure 3.7 Full-time (FT) and part-time (PT) employment by tourism industry in Wales and Great Britain, 2017.....	13
Figure 4.1: The relationship between number of courses and course delivery method.....	29
Figure 4.2: Number of tourism and hospitality course against qualification level	30
Figure 4.3: The number of courses at HE and FE institutions against sector subject	31
Figure 4.4: Learning programmes for Foundation Apprenticeships, Apprenticeships and Higher Apprenticeships, Blue: All leisure, sport and travel; Yellow: All hospitality.	34
Figure 6.1: Values Hierarchy – How the Academy Relates to the Context	53

Figure 6.2: Schematic of specialist course interactions..... 60

Executive Summary

Introduction

- i. Miller Research has been appointed by Bluestone Resorts Ltd and partners to outline the context and vision for a new tourism and hospitality training academy in West Wales.
- ii. The aim of work programme two (WP2) is to identify the gaps in existing education and training provision, that establishes the context in which a future academy would be delivered and present a long term 'vision'. The aim of this work programme and what is presented in this report is thus to stimulate thinking and shape ideas around what an academy could comprise, by building on the evidence collected during work programme one and taking views from stakeholders in the industry.

Approach

- iii. A desk-based review was undertaken to review product development activity, plans, and projects, to identify existing education and training activities and to investigate the role that virtual learning environments have on the delivery of training and education in the sector.
- iv. Input was also sought from innovative practitioners within and beyond the industry who were identified as producing best practice examples elsewhere in Wales and across the UK.

Key Findings

Product and Project Development

- v. The review of the economic and labour profile of Wales - supported by stakeholder interviews - specifically demonstrates the importance of outdoor and adventure holidays to Welsh tourism, alongside training in sustainable management. Existing research has shown an overall lack of outdoor adventure training courses in Wales while at the same time, there are many new developments in the sector over the next few years likely to increase demand for these skill sets. An academy, particularly if set in West Wales, could offer specialist

training in outdoor adventure sports, while also using the natural assets as a ‘pull factor’ to potential recruits.

- vi. The high rates of business deaths and births in Wales also suggests a strong entrepreneurial culture in Wales. This suggests the academy would be well positioned to:
- provide space for students to develop and test business ideas
 - share industry best practice via content development and dissemination
 - develop networks of businesses: numerous studies have demonstrated the benefits to entrepreneurship and innovation via collaboration between further/higher education institutions and the private sector

Education and Training Activities

- vii. The review of education and training activities examined the type of training and skills support opportunities currently available to tourism and hospitality businesses and to the existing and prospective future workforce in the sector.
- viii. For existing businesses, there is support for developing cultural identity and local supply chains; however, what is available in the mainstream education sector tends to be more traditional, perhaps meeting the needs of the existing sector rather than the future aspiration for the region. Instead, there is an identified desire for training that is responsive to current trends and issues in tourism, as well as skills development in cultural understanding, preparation of fresh, locally sourced and high-quality products and sustainable practice in business management.
- ix. There are also silos in the training offer with courses available in ‘leisure and tourism’ or ‘hospitality and catering’, but no training courses that seek to prepare students more holistically in terms of utilising the local culture and physical landscape in order to develop innovative and unique tourism businesses.

- x. Furthermore, not all existing businesses recognise the importance of investing in staff training and development. It is widely accepted that hospitality and tourism is seasonal and that part of the workforce, by definition, is transient. More needs to be done to persuade businesses to value training and skills development in order to cultivate a USP and retain loyal staff who can relay the ‘story’ behind the product they are serving and the environment in which they are based.
- xi. The delivery method for most of the existing training in the sector is traditional, classroom based and leading to a formal qualification and there is relatively little online training available. In order to appeal to a younger and diverse future workforce, who are looking for fulfilment and adventure, training need to be innovative, fast-paced and varied.
Virtual Learning Environments (VLE’s)
- xii. The review of current provision of education and training that utilises technology to create a virtual learning environment included a number of different types of training models. These included a content and support model, a blended model, mass open online courses (MOOC’s), mobile apps, online content platforms and virtual reality (VR). The review also considered existing provision in Wales that harnesses such technologies within the tourism and hospitality sector.
- xiii. There are a number of opportunities and challenges associated with employing VLE’s within the tourism and hospitality sector. Online delivery can be extremely flexible for learners and be of a superior quality to that taught within a traditional setting. It is also economical and efficient which is important for the future academy to consider when making itself scalable. Delivering online content virtually also poses a number of challenges such as isolation of learners means that they require more support and technical issues associated with technology.
- xiv. There are a number of international best practice examples of organisations that are attempting to encourage improvements in

education and training through the use of virtual learning environments including: the THINK institutes use of online material to compliment it's physical courses, Duolingo using mimicking video games to encourage users to acquire language skills, the use of Coursera as a platform for MOOC's, and online content hosting platforms such as Typsy that attempt to provide short online training videos to upskill workers within the tourism and hospitality sector.

- xv. Virtual learning environments provides an opportunity for a future academy to engage and train participants in a fundamentally more accessible way for the tourism and hospitality sector if the technology is properly utilised.

Options for a Sustainable Tourism Academy

- xvi. The Academy should be underpinned by a strong set of values, relating to Wales, South West Wales in particular, and to the key audience segments.
- xvii. We have suggested three potential forms in which the academy could take: a physical establishment, a blended option, and a virtual provider of training with a number of courses that it could offer as well as the opportunities to share best practice.

Entry Level Course

- xviii. A future academy could recruit school leavers and those looking for a career change to the sector by offering an entry level course of training. A qualification awarded after pursuing such a course would recognise the acquisition, by students, of the basic knowledge and skills to apply them to the practicalities of work within the tourism and hospitality sector. Such a course would allow the academy to overcome the barriers of recruiting new employees.

Elite Entrepreneurship Course

- xix. An elite entrepreneurship course within the academy could help contribute to shifting the perception of the tourism and hospitality sector as offering no career progression, being low-skilled, and low

paid. Recruiting those who already have a high level of experience working within the sector and developing their skills would encourage staff retainment within the existing workforce by better improving career prospects. The prestige associated with undertaking such a course would have the potential to create a network of elite workers operating within the tourism and hospitality sector.

Gap Year Course

- xx. The tourism and hospitality sector relies heavily on young workers who are difficult to retain. A course offered specifically for those who intend to leave the sector after a short period of employment would allow the industry to embrace the issue of retention of the workforce rather than suffer with it. A short, intense course for such a demographic would allow workers to operate to the industry's short term needs as well as shifting perceptions for those who may continue to work within the sector long-term.

In-Work training Course

- xxi. The aim of an in-work training course would be to provide employers the opportunity up-skill their existing workforce by sending their staff on a training courses that is specifically tailored to the operation of their business. For example, content could be about local sourcing and how to market Welsh produce with a narrative that reflects the local area and business ethos.

Sharing Best Practice in the Sector

- xxii. A future academy's relevance is premised on its ability to demonstrate and share best practice throughout the tourism and hospitality sector. It is, therefore, imperative for the academy to host events, create a network between students, alumni, and businesses, to produce its own content to encourage interactions with industry leaders as well as to recruit participants, and utilise academy ambassadors to create a distinctive brand.

1. Introduction/Background

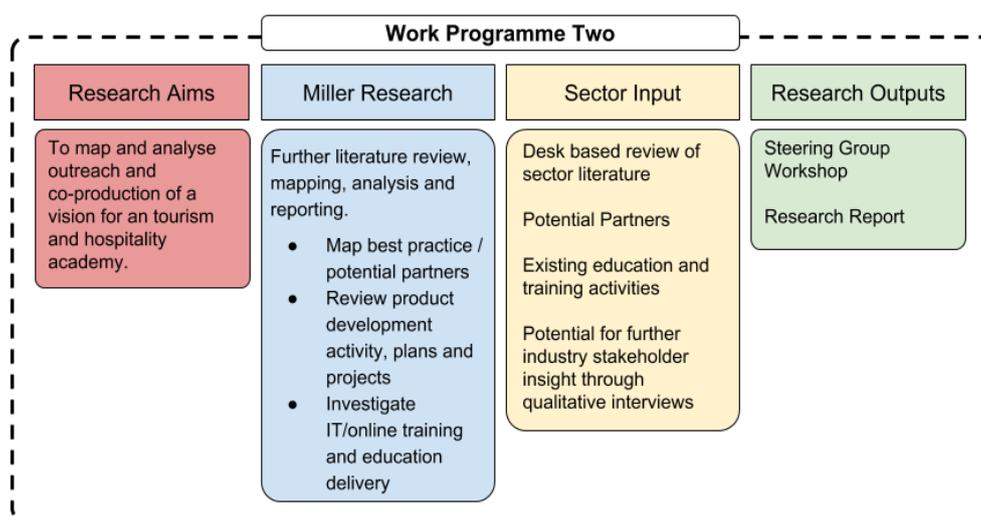
- 1.1 Miller Research was appointed by Bluestone Resorts Ltd and partners to outline the context and vision for a new tourism and hospitality training academy in South West Wales.
- 1.2 The project is structured into three work programmes; work programme one (WP1) scoped the context of existing training and skills needs in Wales and presented a number of high-level opportunities for a future academy in South West Wales. This second work programme aims to identify the gaps in existing education and training provision and the examine how this would affect a future academy. The key findings from this phase are documented in this report.
- 1.3 WP2 also focuses on establishing a long term ‘vision’ for the academy, building on the evidence collected during 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 WP2. The third chapter outlines current trends in Welsh tourism and hospitality and highlights some of the future implications. The fourth chapter discusses existing education and training provision within or of relevance to the sector that is available in Wales. The fifth chapter covers how virtual learning environments (VLE’s) are utilised to support education and training provision both within Wales and internationally. The final chapter aims to establish the values base of the academy by presenting three potential blueprints that draw on the analysis of the strengths, weaknesses, opportunities and threats for the academy.

2. Methodology

Aims

- 2.1 The aim of WP2 is to consider existing provision of education and training activities within the present context of the tourism and hospitality sector, to inform the long term ‘vision’ for the academy. The aim of this work programme and what is presented in this report is thus to stimulate thinking and shape ideas around what an academy could comprise, based on gaps in existing provision within the tourism and hospitality industry and stakeholder views on what is required within the sector both now and in the future.
- 2.2 The diagram below outlines the research aims, approach and sector input to WP2.

Figure 2.1: Approach to WP2



Approach

Summary of WP1:

- 2.3 The aim of work WP1 was to deliver a series of scoping exercises, to generate an evidence base that established the context in which a potential academy would be delivered. It therefore attempted to stimulate thinking and shape ideas around what a future academy could comprise.

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

- Identify the context and need for change – 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

Scoping Interviews

2.5 Interviews were conducted with key stakeholders both from within the Welsh tourism industry and other relevant sectors. The interviews sought to explore the context for the proposed academy by, specifically, establishing:

- the *need* for the academy
- whether similar initiatives have been considered in the past
- what would appeal to new entrants in South West Wales or Wales as a whole.

2.6 The interviews were also utilised as an opportunity to identify existing research and best practice, to be included within the documentation review. These interviews were on-going and the findings from them have been reported within this work programme.

Steering Group Workshop

2.7 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 were used to inform the WP1 report.

Work Programme 2:

Desk based review

2.8 A key element of the desk-based review was to understand what is currently being offered within the tourism and hospitality sector that

could help to shape the training academy. In particular, three key areas have been identified that can inform the long term ‘vision’ for the academy:

- The contextual trends within the tourism and hospitality sector in terms of product/process development
- Existing provision of education and training within the tourism and hospitality sector
- Current utilisation of virtual learning environments and the potential opportunities and challenges for the sector

2.9 Drawing on the evidence gathered in previous stages, we conducted a desk-based review of current literature on these and some of the challenges that the sector faces in terms of education and training provision. We additionally explored wider attitudes to work and areas outside the tourism sector where initiatives such as links to lifestyle choices have been successful.

2.10 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. The report weaves these examples into its findings and sets them in the present context that will inform the proposed academy.

2.11 The final element of WP2 was to establish the values base of the future academy. This report has done so by presenting three structural options based on current market trends across the sector and future developments that will shape the tourism and hospitality sector in the coming years.

Work programme three

2.12 The final stage of the research will build upon the findings identified in work programmes one and two. It will aim to develop a business plan and a ‘blueprint’ for a tourism and hospitality training academy by utilising the recommendations and ‘vision’ that is presented within this report.

3. Wales: Product and Project Development

3.1 This section of the report provides an economic and labour market profile of Wales (with a focus on South West Wales where appropriate), and an overview of product / process development present within the sector. It is important to consider this in context of the ‘academy’ to ensure it is delivered in line with the local context – e.g. enabling delivery of national plans to ensure economic growth and responding to the economic needs of the region.

Economic Trends

3.2 This report acknowledges that there are various competing definitions of tourism, and what comprises a tourism business. The previous report (WP1), however, highlighted a number of important aspects of Welsh tourism (e.g. culture and heritage) that will be considered. Therefore, the following SIC Codes have been considered:

- 55: Accommodation
- 56: Food and beverage service activities
- 79: Travel agency, tour operator and other reservation service and related activities
- 90: Creative, arts and entertainment activities
- 91: Libraries, archives, museums and other cultural activities
- 92: Gambling and betting activities
- 93: Sports activities and amusement and recreation activities

The analysis will sometimes discuss businesses that focus on the basic infrastructure and servicing needs of tourism (55, 56, and 79) and attractions (90, 91, 92 and 93) separately. Where a two digit SIC code breakdown is unavailable, the industry has been defined as:

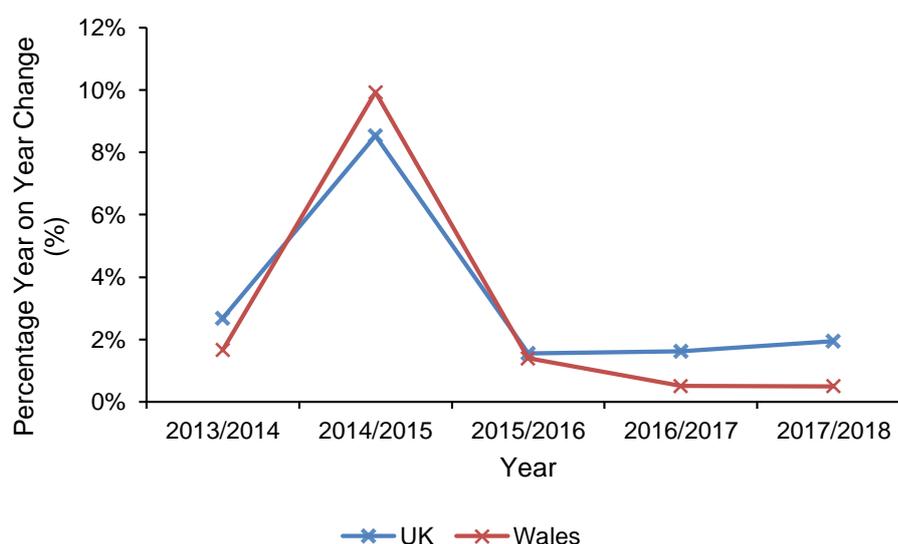
- Accommodation & food services
- Arts; entertainment; recreation and other services.

Business Counts

3.3 A count of businesses operating in Wales according to the SIC codes outlined above, shows that as of 2018 there are 11,055 tourism

businesses present in Wales. Since 2013, this represents a growth of 1,395 (14.4 per cent). The UK has experienced a slightly higher level of tourism business count growth between 2013 and 2018, at 17.2 per cent. Figure 3.1 below presents the year-on-year percentage growth of tourism business counts between 2013 and 2018 for the UK and Wales.

Figure 3.1: Percentage Year on Year Change in Tourism Business Counts, UK and Wales



Source: UK Business Counts – enterprises by industry (2018) Analysis: Miller Research¹

Overall, the graph demonstrates – apart from the spike in 2014/2015 – the rate of growth in the UK has been higher than in Wales. Nevertheless, the numbers of tourism businesses in Wales has continued to grow during this time.

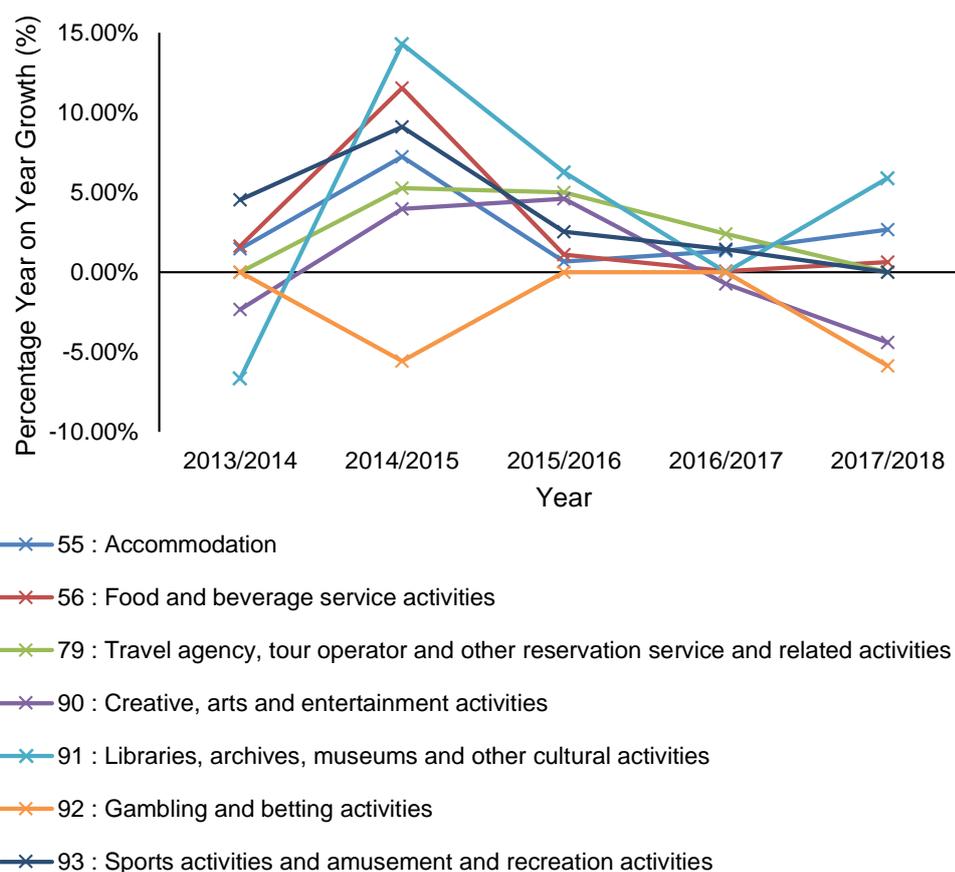
3.4 Figure 3.2 (which presents the percentage year-on-year growth for each tourism sub-sector in Wales) demonstrates that the growth is visible in almost all aspects of the tourism sector other than gambling.² The overall highest growth between 2013 and 2018 was in libraries, archives, museums and other cultural activities at 20 per cent. Similarly, sports activities saw growth of 19 per cent during this

¹ UK Business Counts (2018) Enterprises by Industry and Country

² UK Business Counts (2018) Enterprises by Industry and Country

timescale, whilst gambling and betting activities decreased by 11 per cent, and creative, arts and entertainment activities businesses decreased by one per cent. It is unclear what caused the ‘spike’ in 2013/2014 but as this is also observed in UK statistics, it can probably be attributed to a change in methodology from data collection, rather than a one-off event.

Figure 3.2: Year on Year Percentage Change in Business Counts for the Tourism Industry, by Two Digit SIC Code in Wales



Source: UK Business Counts – enterprises by industry (2018) Analysis: Miller Research³

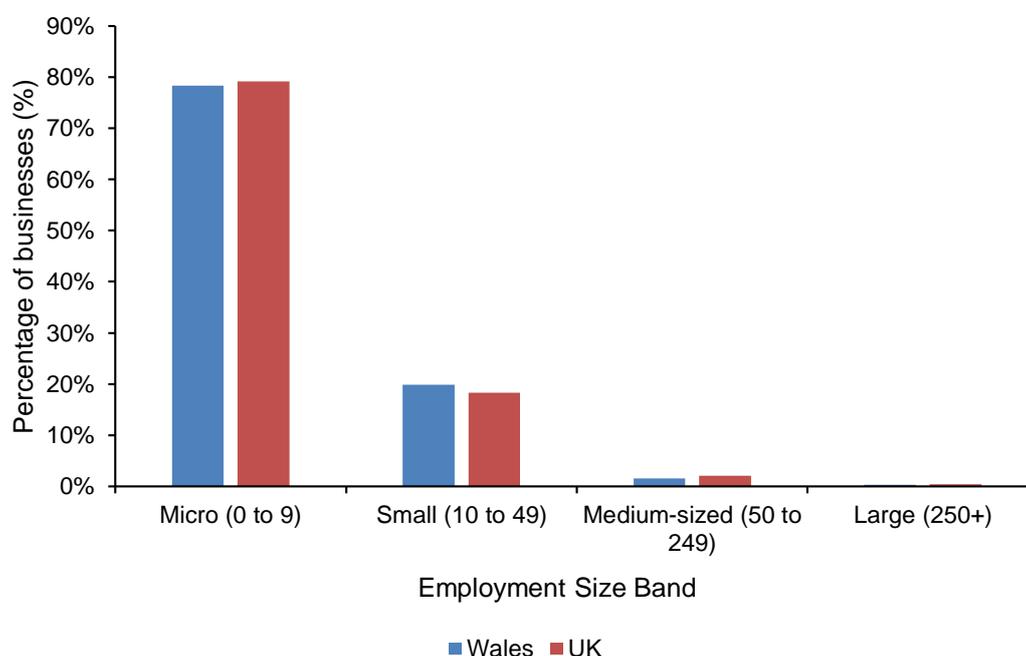
Business Size and Turnover

3.5 As stated in wider literature, the tourism sector is dominated by a large proportion of small, low employer businesses. Figure 3.3 confirms these findings – and demonstrates that just under 80 per

³ UK Business Counts (2018) Enterprises by Industry and Country

cent of tourism businesses (in both Wales and the UK) employ nine or fewer individuals.

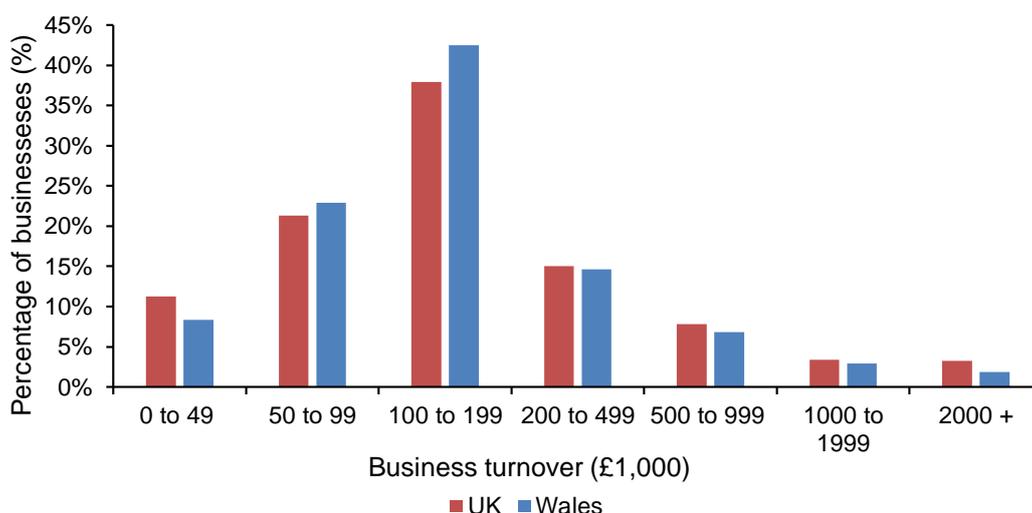
Figure 3.3: Percentages of businesses against the business size, UK and Wales



Source: ONS (2018) UK Business Counts – enterprises by industry and employment size band

3.6 In terms of tourism business turnover – the Welsh tourism sector follows a similar distribution to UK tourism. Figure 3.4 presents the percentages of UK and Welsh tourism businesses (using the SIC codes above), by turnover. Overall, it suggests that the tourism sector in both the UK and Wales is characterised by businesses with a turnover of less than £200,000 per annum.

Figure 3.4 Tourism Businesses in UK and Wales, percentage according to turnover (£1,000)



Source: ONS (2018) UK Business Counts – enterprises by industry and turnover

Start-ups and Entrepreneurship

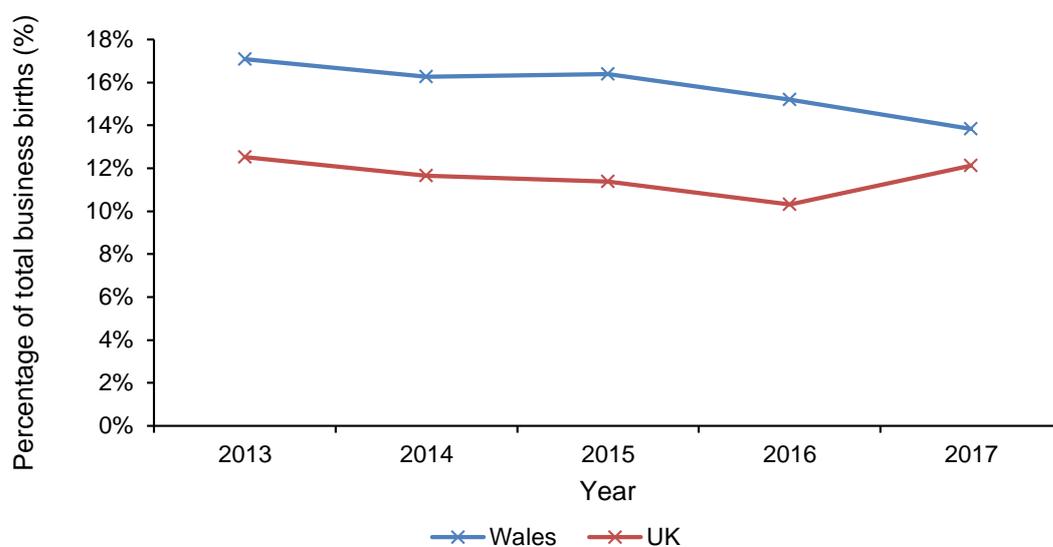
3.7 Business start-up rates are a key indicator of the pool of entrepreneurs within the tourism sector in Wales. The rate of business ‘births’ in the tourism industry⁴ declined between 2012 and 2017, from 17.09 per cent, to 13.85 per cent. In contrast, the rate of UK tourism business births⁵ remained consistent – from 12.52 per cent in 2012, to 12.11 per cent in 2017 with no substantial changes during this time.⁶ Overall – while the difference narrowed between the UK and Wales over this period – the data suggests entrepreneurship within tourism is more important to Wales than to the UK as a whole.

⁴ As a percentage of all business births

⁵ As a percentage of all business births

⁶ Stats Wales (2019) Business Demography - Business births, deaths and active enterprises in Wales and UK by industry (SIC 2007), variable and year

Figure 3.5 Tourism Business Births in Wales and UK as a Percentage of Total Business Births, 2013-2017.



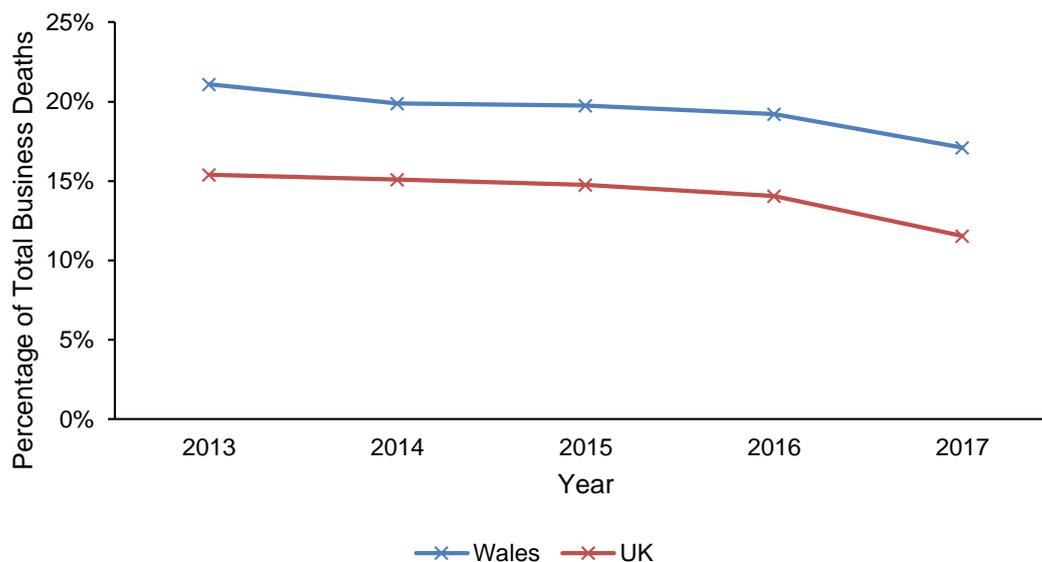
Source: Stats Wales (2019) Business Demography Births, Deaths and Active Businesses, analysis by Miller Research

3.8 In the same time period, Wales experienced a higher – but declining – rate of business deaths in the tourism sector (out of total business deaths) than in the UK. Between 2012 and 2017 tourism business death rates fell from 21.09 per cent (of total business deaths) to 17.11 per cent.⁷ The UK similarly experienced a decline during this time, from 15.40 per cent, to 11.54 per cent.⁸ Overall these figures suggest a greater level of sustainability among tourism businesses in Wales in relation to others compared with the UK during this time.

⁷ Stats Wales (2019) Business Demography - Business births, deaths and active enterprises in Wales and UK by industry (SIC 2007), variable and year

⁸ Stats Wales (2019) Business Demography - Business births, deaths and active enterprises in Wales and UK by industry (SIC 2007), variable and year

Figure 3.6 Tourism Business Deaths in Wales and UK as a Percentage of Total Business Deaths, 2013-2017



Source: Stats Wales (2019) Business Demography Births, Deaths and Active Businesses, analysis by Miller Research

3.9 Overall the high rates of business births and deaths suggest entrepreneurship in tourism is more important to Wales than to the UK as a whole – however stakeholder interviews have highlighted barriers to business growth:

- A lack of networks between businesses, as individuals view themselves in competition which restricts collaboration.
- Businesses working in silos weakens the sector as a whole because an incoherent idea of 'Welsh Tourism' is marketed.

Development of HR assets

Jobs and Employment: Overview

3.10 Wales has a slightly lower overall rate of employment than the UK – at 72.6 per cent, in comparison to 75 per cent. The regions across Wales vary substantially from South West Wales at 69.4 per cent

through to North Wales at 75.3 per cent.⁹ Only one region (North Wales) has a higher employment rate than the UK.¹⁰ In terms of year-on-year growth, Wales' overall employment rate has grown 0.6 per cent, which is the same rate as the UK.¹¹

3.11 In terms of earnings Wales falls substantially lower than the UK: with average weekly earnings of £509.00 in comparison to £569.00.¹² Correspondingly, the GVA and GDHI per head are considerably lower in Wales than the UK – GVA is £19,899 in Wales compared to £27,289 in the UK, and GDHI is £15,835 in Wales in comparison to £19,432 in the UK. Alongside inequalities of wealth generation within the UK - regional inequalities exist within Wales: with Mid Wales average weekly earnings of £478.40, North Wales at £498.80, South West Wales at £508.70 and South East Wales at £520.00. Importantly, regional inequalities within Wales and between UK nations suggests that there is a significant economic need to grow the tourism sector in a way that provides well-paid employment, with benefit across the country.

Jobs and Employment: Tourism

The tourism and hospitality sector in Wales (using the SIC codes above) contributes to a total of 10.4 per cent of employment, in comparison to 10.2 per cent in the UK as a whole. The areas within Wales vary substantially, however – ranging from 6.8 per cent in Torfaen, through to 19.8 per cent in Pembrokeshire. This

⁹ Welsh Government (2019) Regional Economic & Labour Market Profiles (<https://gov.wales/docs/statistics/2019/190129-regional-economic-labour-market-profiles-january-2019-en.pdf>)

¹⁰ Welsh Government (2019) Regional Economic & Labour Market Profiles (<https://gov.wales/docs/statistics/2019/190129-regional-economic-labour-market-profiles-january-2019-en.pdf>)

¹¹ Welsh Government (2019) Regional Economic & Labour Market Profiles (<https://gov.wales/docs/statistics/2019/190129-regional-economic-labour-market-profiles-january-2019-en.pdf>)

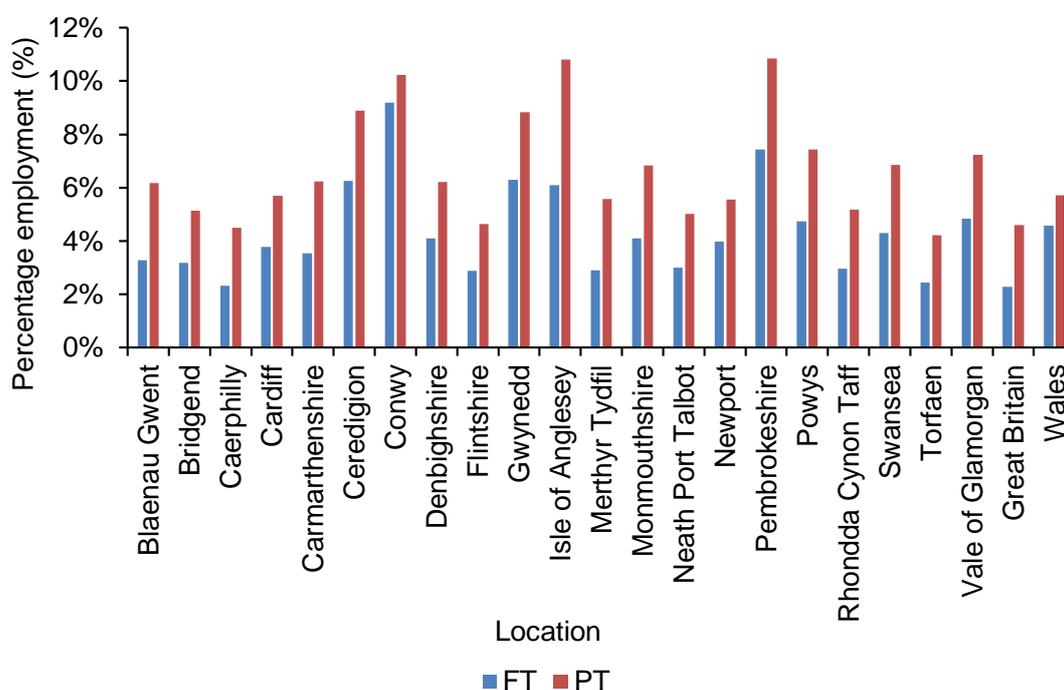
¹² Welsh Government (2019) Regional Economic & Labour Market Profiles (<https://gov.wales/docs/statistics/2019/190129-regional-economic-labour-market-profiles-january-2019-en.pdf>)

demonstrates some regions of Wales are more reliant on the sector for employment than others.

Insecure Employment

3.12 As numerous studies have demonstrated, and stakeholders commented, there is a prevalence of part time and insecure work within the tourism and hospitality industry. This is demonstrated in Figure 3.7 below, which demonstrates that there are overall more individuals working part-time than full-time, across the tourism sector in Wales.¹³

Figure 3.7 Full-time (FT) and part-time (PT) employment by tourism industry in Wales and Great Britain, 2017



Source: Business Register and Employment Survey, 2017. Analysis by Miller Research

3.13 While the overall proportion of employees working in the tourism industry varies considerably (e.g. Torfaen in comparison to Pembrokeshire), there is consistently a higher number of part-time than full-time workers within the sector across Wales. Across the UK,

¹³ Using totals of the SIC codes listed above.

approximately 17.6 per cent of those working in ‘transport, arts and other services’, and 22 per cent of those working in accommodation and food, had zero hours contracts.¹⁴ Although this data isn’t available by sub-sector and for Wales, it is likely that a substantial proportion of employees in the Welsh tourism industry are working on insecure contracts such as these. Alongside insecurity of hours and therefore earnings, researchers from University College London have suggested that mental and physical health is also affected due to the stress associated with these contracts.¹⁵

3.14 As discussed in the WP1 report, seasonality significantly affects employment within the sector with employers often unable to offer year-round employment, or apprenticeship schemes.¹⁶ A stakeholder interviewed for this piece of research commented on an individual with a natural talent for customer service and who had an in-depth understanding of local history, but had no interest in progressing their career in tourism. On the other hand, it was noted that those who do ‘stick at it’ are likely to find a rewarding career with reasonable income. To deliver greater prosperity for individuals within the sector – and to address negative perceptions among potential recruits, the Federation of Small Business (FSB) Wales have suggested that tourism SMEs need to leverage greater levels of support (in terms of both business support and finance).¹⁷ In their survey of tourism SMEs, just 15 per cent said they had received public finance through Welsh Government support schemes.¹⁸ In an assessment of the most

¹⁴ Statista (2016) share of employees within specified industry on a zero hours contract in the United Kingdom (UK) from April to June 2016

[<https://www.statista.com/statistics/407833/share-zero-hour-contracts-industry/>]

¹⁵ UCL (2017) Being on a zero-hours contract is bad for your health

[<https://www.ucl.ac.uk/news/2017/jul/being-zero-hours-contract-bad-your-health>]

¹⁶ FSB Wales (2018) Boosting the Economic Impact of Tourism in Wales

[https://www.fsb.org.uk/docs/default-source/fsb-org-uk/fsb_tourism_eng.pdf?sfvrsn=0]

¹⁷ FSB Wales (2018) Boosting the Economic Impact of Tourism in Wales

[https://www.fsb.org.uk/docs/default-source/fsb-org-uk/fsb_tourism_eng.pdf?sfvrsn=0]

¹⁸ FSB Wales (2018) Boosting the Economic Impact of Tourism in Wales

[https://www.fsb.org.uk/docs/default-source/fsb-org-uk/fsb_tourism_eng.pdf?sfvrsn=0]

prominent sources of financial support¹⁹ it was found that the application criteria are ‘out of reach’ due to FTE job creation targets.²⁰ Overall, therefore – tourism SMEs are often struggling to access potential support to develop the sector and grow employment opportunities.

Skills Specialisms: Chefs and Outdoor Adventure

- 3.15 The report developed for WP1 covered a number of skills gaps currently faced by the industry alongside future trends which will affect training needs. These have been recognised by various national and regional development and training plans. The skills needs can be categorised as: specialist technical skills (e.g. culinary), customer facing skills, business and marketing, technology, management and leadership, and finally innovation and entrepreneurship. Each are taken in turn below to provide an overview of upcoming developments for the sector.
- 3.16 As identified in the WP1 report, Wales is well positioned to deliver upon trends of demand for ‘ecotourism’, and outdoor ‘experiential’ based tourism. This is primarily due to the natural assets (landscape and coastline) alongside existing prominent businesses operating within the region (e.g. ZipWorld and Surf Snowdonia). A stakeholder interviewed for this research emphasised the coastline in Pembrokeshire as an appeal – but one that is likely to be strongly affected by seasonality due to weather. An Economic Impact of Outdoor Activity Tourism in Wales (produced in 2014) outlined a number of limitations in the current outdoor adventure tourism offer, that were predicted to restrict growth.²¹ Alongside limited marketing (in comparison to other regions within the UK – e.g. The Lake District)

¹⁹ Tourism Investment Support Scheme, Tourism Amenity Investment Support, Tourism Product Innovation Fund, Regional Tourism Engagement Fun, and Micro Small Business Fund

²⁰ FSB Wales (2018) Boosting the Economic Impact of Tourism in Wales [https://www.fsb.org.uk/docs/default-source/fsb-org-uk/fsb_tourism_eng.pdf?sfvrsn=0]

²¹ Miller Research (2014) The Economic Impact of Outdoor Activity Tourism in Wales: Final Report [http://www.outdoorrecreationni.com/wp-content/uploads/2015/11/The-Economic-Impact-of-Outdoor-Activity-Tourism-in-Wales-Visit-Wales-March-2014.pdf]

and financial barriers, the report outlined a number of skills gaps within the current workforce. The associated skills gaps were:

- insufficiently experienced staff/applicants
- low demand of people willing to work within the sector due to low wages
- a lack of ‘soft skills’ and commitment.

3.17 The Food Tourism Action Plan 2015-200 outlines a number of actions for the sector in terms of skills and knowledge development. Under ‘developing expertise’ the strategy outlines the following actions:²²

- Collate information for a local sourcing guide to provide stakeholders with information on the benefits to businesses of sourcing and promoting local food and drink.
- Develop and pilot the Food Tourism Business Support project to provide support for hospitality businesses to improve their tourism offer and visitor experience.
- Identify opportunities for collaboration with FE Colleges in Wales on Food and Hospitality.
- Initiate opportunities to share best practice in food tourism.
- Encourage food and drink businesses to benefit from WRAP Cymru’s initiative to reduce waste and increase profitability.
- Liaise with VW Quality Grading Team to encourage tourism businesses to improve the quality of the food offer, encourage use of local produce, and generally adopt Food Tourism best practice.

The RDP (Rural Development Programme) has responded to this strategic need and currently funds a number of projects to develop culinary skills, and local supply chains, for example Food Skills Cymru (see Chapter 4). The effect that Brexit will have on these support mechanisms is currently unknown (due to a lack of clarity about the

²² Welsh Government (2015) Food Tourism Action Plan 2015-2020. [\[https://gov.wales/sites/default/files/publications/2018-05/food-tourism-action-plan-2015-to-2020.pdf\]](https://gov.wales/sites/default/files/publications/2018-05/food-tourism-action-plan-2015-to-2020.pdf)

final Brexit deal) and any replacement funds made available to Welsh Government from Westminster to support these efforts. It is clear – however – that an Academy has scope to deliver specialist skills relating to local Welsh food, alongside sustainability (such as waste management, local supply chains, and carbon reduction).

Skills: Technology and Innovation

- 3.18 As set out in WP1, advances in technology are likely to have significant impact on the labour market: from skills demand, through to the types of jobs, and levels of income.
- 3.19 One of the most significant shifts in technology is the often-cited Internet of Things (IoT), defined by the World Economic Forum (WEF) as ‘a network of physical objects that contain embedded technology to communicate and sense or interact with their internal states or the external environment.’²³ Already, IoT is beginning to shape our daily lives, for example from ‘smart homes’ to wristband activity trackers.²⁴ Another shift is robotics and automation. Automated processes are likely to reduce the number of jobs that require repetitive processes (such as administration, or even cleaning). Related to both automation and IoT is the extensive data collection undertaken to enable these processes. Consumer behaviour mapping – via social media or otherwise – is significantly affecting the way in which marketing and new innovations within the tourism sector are developed.
- 3.20 Despite some forecasts (such as around automation), mass job losses are not a guarantee and there are opportunities for the tourism sector to deliver a wide range of sustainable employment opportunity, should the right skills be in place. For example (as discussed in WP1) tourism spend is largely being driven by *quality* and *personalised, unique experiences* rather solely lowest possible cost. As stated by

²³ WEF (2015) Industrial Internet of Things: Unleashing the Potential of Connected Products and Services [http://www3.weforum.org/docs/WEFUSA_IndustrialInternet_Report2015.pdf]

²⁴ WEF (2015) Industrial Internet of Things: Unleashing the Potential of Connected Products and Services [http://www3.weforum.org/docs/WEFUSA_IndustrialInternet_Report2015.pdf]

one stakeholder, ‘learning to care’ about the environment, people and places are essential to the future of the sector. Furthermore, in a WEF survey of leading global employers and professionals, 16 per cent considered consumer awareness of ethical and privacy issues as a key driver for change in consumer demand.²⁵ As commented by a European Parliament briefing paper “European companies can compete on the basis of innovation... on the ability to produce customer-driven designs... or on quality.” Thus, although routine jobs may be automated, robotics will not be able to replace human creativity and innovation, which is likely to increase in demand. Hospitality by definition is about demonstrating warmth and generosity, both very human qualities that would be difficult to replicate through automation (though it is likely to become a premium – where some chain hotels have already replaced check in services with automated machines).

- 3.21 To capitalise on these trends (e.g. to utilise consumer data appropriately), STEM (science, technology, engineering and mathematics) skills will need to be integrated within tourism training provision. Although Welsh Government have developed a strategy for improving STEM teaching among learners aged 3-19, it is unclear whether there are plans to develop this skills base for within the existing workforce, and school leavers.²⁶

Entrepreneurship and Innovation

- 3.22 Alongside specialisms relating to tourism, the availability and capability of entrepreneurs and business managers is important to consider – particularly when discussing the types of training and facilities available in an academy (see Chapter 6). WP1 demonstrated that most tourism courses provide students with a commercial

²⁵ World Economic Forum (2016) The Global Information Technology Report 2016 [http://www3.weforum.org/docs/GITR2016/WEF_GITR_Full_Report.pdf]

²⁶ Welsh Government (2018) Science, Technology, Engineering and mathematics (STEM) in education and training – a delivery plan for wales [https://gov.wales/sites/default/files/publications/2018-02/science-technology-engineering-and-mathematics-a-delivery-plan-for-wales.pdf]

understanding of whichever role they specialise in, or if they go on to work in a managerial position. One stakeholder pointed to a number of existing links between tourism education and entrepreneurship in Wales – including the ‘Be the Spark’ competition, and a number of incubator hubs across the country.

- 3.23 To further deliver entrepreneurship and innovation within the tourism sector, support must be provided to ensure the correct networks and skills are provided.

Regional priorities

- 3.24 In terms of existing / future developments – the Regional Skills Partnerships (RSPs) and employment skills plans across Wales show priorities for the region and skills gaps. These have significant implications for the academy as it highlights specific areas that it could deliver upon.

- 3.25 In **South East Wales** (Cardiff Capital Region), tourism is not highlighted as a ‘priority sector’ but nevertheless the regional priorities are applicable for the sector (and reflect above discussions). These include:²⁷

- Supporting existing industries to deliver:
 - ‘people and personal skills’ – it is recommended these ‘soft skills are integrated in future learning programmes.
 - ‘digital skills’ – such as cyber security, coding, programming, and data analytics.
 - ‘adult skills’ – ensuring the existing workforce can address the existing labour / skills shortages within some sectors.
- Increasing the number of apprenticeships.
- ‘future proofing’ the work force – through greater levels of ICT literacy.

²⁷ Learning, Skills and Innovation Partnership – South East Wales (2017) Cardiff Capital Region Employment and Skills Plan 2017 p http://www.lskip.wales/downloads/170731_employment%20skills_plan_eng.pdf

3.26 For **South West and Mid Wales**, the skills plan for 2016-2024 outlines a number of priorities for the region – which include upskilling the existing workforce, ensuring skills delivery is responsive to growth sectors, and developing an entrepreneurial culture. In terms of specialist and specific skills and knowledge training challenges for the sector, the skills challenges in relation to tourism were:²⁸

- Customer service
- High level culinary
- Specific recreational skills
- Cultural and heritage
- Leadership and management

3.27 The **North Wales** skills and employment plan outlines tourism and hospitality as a growth sector for the region. It is estimated that there will be an increase of 25.9 per cent in professional occupations within the sector, and importantly 31.2 per cent growth in associate professional and technical occupations by 2024.²⁹ This high demand suggests specialist and managerial skills are a priority going forward for the sector. A priority among those is among chefs – and is cited to be a ‘people’ shortage rather than skills, suggesting a key barrier is perceptions of the industry rather than skills provision. Another key gap highlighted within the report is a lack of a coordinated approach to delivering outdoor adventure skills (e.g. a lack of apprenticeships).³⁰ In North Wales Welsh Language is highlighted as significant skill necessary to deliver growth in this sector – where it is considered central to visitor experiences of a distinct culture and community.³¹

²⁸ Regional Learning Partnership: South West and Central Wales (2015) Regional Delivery Plan for Employment and Skills for South West and Central Wales 2014-2024 (Fourth Version) [http://www.rlp.org.uk/wp-content/uploads/Regional_Delivery_Plan_4th_Version.pdf]

²⁹ North Wales Ambition Board (2017) North Wales Regional Skills and Employment Plan [<http://regionalskillsandemploymentplan.co.uk/#p=1>]

³⁰ North Wales Ambition Board (2017) North Wales Regional Skills and Employment Plan [<http://regionalskillsandemploymentplan.co.uk/#p=1>]

³¹ North Wales Economic Ambition Board (2018) Welsh Language in North Wales [https://northwaleseab.co.uk/sites/nweab/files/documents/nweab_the_welsh_language_in_north_wales_-_regional_skills_employment_plan_2018_back_up_english_1.pdf]

Product development activity, plans and products

3.28 There is considerable new project development in tourism in Wales at present, perhaps especially in the outdoor adventure sector, but also with regard to new hotel developments and conference venues.

Activity Tourism

3.29 A number of new developments and expansions are planned or have recently been completed in the adventure tourism sector in Wales, including the following:

- Oakwood theme park is opening two new attractions at its site in Pembrokeshire. Oakwood employs 20 full-time staff year-round and a further 300 part-time and seasonal workers. It has experienced more than £8.5m of investment over the last ten years.
- The Afan Valley Adventure Resort³² is a planned 317-acre development in NPT, featuring up to 600 accommodation lodges and a 100-bedroom hotel, along with shops and restaurants. The resort aims to provide a broad portfolio of adventure sports for all ages and abilities, from downhill skiing to surfing, split across four activity zones. The project, which is estimated to have a gross economic impact of almost £240m is expected to employ 970 people, through 451 full-time and 519 part-time jobs by 2021.
- Adventure Parc Snowdonia³³ is an expansion of the Surf Snowdonia brand, with a £16m investment in a wider range of experiences and a new 106 room hotel on the site, creating 145 full and part-time jobs. The attraction will include indoor climbing and artificial caving, outdoor mountain biking trail, bouldering and offsite gorge walking, kayaking and other sports. The hotel is expected to open in 2020.

³² <https://afanvalleyadventureresort.com/the-resort/>

³³ <https://www.dailypost.co.uk/news/north-wales-news/plans-106-room-surf-snowdonia-15417322>

- Activity centre provider Robinwood recently opened a £5.6m refurbishment of a former hotel at Maes-y-Nant, Wrexham to provide facilities for school parties to undertake residential outdoor activity courses. The site includes accommodation for 170, a giant swing and zip wire, along with an indoor caving system and purpose-built lake for raft building and canoeing.
- ZipWorld has announced plans for its first project outside of North Wales –on the Tower Colliery site at Hirwaun³⁴. The project would provide three separate zip wire courses running from the top of the Rhigos Mountain to the Tower Colliery car park⁸.
- Swansea City Council are working with a New Zealand-based company on plans to establish a cable car and downhill luge attraction on Kilvey Hill, overlooking the city and linked to Hafod Morfa³⁵. If successful, the plans for the gondola ride, viewing centre and associated restaurant could cost in excess of £50m and employ in the region of 100 people, following a three to five-year construction period.

These developments highlight the interest in Wales as an activity and adventure destination at present.

Other Attractions

- The National Botanic Garden is in the construction phase of a £7.2m project to restore its heritage landscape and waterpark. The work is expected to take until 2020 to complete, after which it will open to the public.
- Planetarium Wales³⁶ is a concept for a large planetarium attraction on the site of the former Tower Colliery at Hirwaun, RCT. The project is currently seeking investment of some £40m to develop a 350-seat theatre, outdoor entertainment

³⁴ <http://www.cadnantplanning.co.uk/delwedd/resources/2018.067-daps-issue-for-pac-v1.0-15.02.19-2.pdf>

³⁵ <https://www.walesonline.co.uk/news/wales-news/firm-behind-major-gondola-luge-14752115>

³⁶ <https://planetarium.wales/>

zone, educational facilities and possibly research spaces built around the theme of astronomy, dark skies and space research.

Events, Exhibitions and Conference Space

- The International Convention Centre Wales at the Celtic Manor Resort (CMR), Newport is due to open late in 2019; providing 26,000m² of space for large scale conferences and conventions. The project, costing some £84m is expected to generate up to 90,000 room nights annually and to create up to 790 jobs³⁷. In an associated development, CMR has applied for permission to develop a 146-room budget hotel at Coldra Court, delivering 70 hospitality jobs.
- Plans have been approved for an indoor arena in Swansea, as part of a £120m Swansea Central regeneration scheme. The 3,500-seater arena is due for completion by the end of 2020. A linked hotel development is likely to be put forward shortly and the overall scheme is expected to provide some 1,700 permanent jobs.

Hotels and Other Accommodation

- The Slate Mountain Lodge³⁸, at Llechwedd, Blaenau Ffestiniog is a 24-bed hotel to complement glamping lodges which were recently developed on the site. It forms part of a £1.5m programme which is expected to create 23 new jobs when it opens to the public in 2020.
- Hafod Morfa Copperworks³⁹ was awarded £3.56m of Heritage Lottery Fund money to refurbish the Powerhouse on site and create a distillery (in association with Penderyn Whisky) and associated visitor centre. Work will get underway later in 2019.

³⁷ Miller Research estimates for Welsh Government, 2016.

³⁸ <https://wales247.co.uk/slate-mountain-lodge-4-star-hotel-will-welcome-guests-from-spring-2020/>

³⁹ <http://hafodmorfacopperworks.com/hlf-funding-success/>

- Newport's Chartist Tower is the subject of plan for a 163-bed Mercure hotel for the city centre, as part of a £12m mixed use development, which in turn forms part of the ongoing city centre regeneration. If achieved, the site would create in excess of 350 jobs in the iconic 15-storey building.
- Ambitious plans for the former North Wales Hospital in Denbigh would create two hotels and 450 jobs as part of a mixed tourism and residential development in a £100m project. The developers included proposals for a hospitality training centre as part of the scheme, and this would be expected to create a further 100 jobs.
- In Gwynedd, the iconic Plas Glynllifon, near Caernarfon⁴⁰, is in the process of restoration as a major hotel and visitor attraction, with the potential to attract 250,000 visitors annually and provide some 200 jobs for local people.

Brexit

3.30 WP1 discussed in detail how the UK's withdrawal from the European Union may affect the future of tourism, particularly in relation to HR assets. Brexit is likely to effect tourism due to restrictions to freedom of movement, changes to supply chains, EU funded projects in Wales, and ongoing 'readiness preparations' in Wales. Overall it was discussed that reductions in EU nationals working in Welsh tourism may result in a skills shortage across Wales – particularly if this is met with an increase in foreign nationals and UK 'stay cations' due to a fall in the value of the pound. Stakeholders interviewed for this project were mixed in their view on how Brexit may affect the sector however there was a general view that it provides opportunity to further develop local talent and sustainable employment opportunities. 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.

⁴⁰ <http://plas-glynllifon.com/doc/press-release-may-18.pdf>

Destination Management Plans – South West Wales

- 3.31 The WP1 report provided an overview of policy developments in Wales that will contribute to how skills requirements are shaped over the coming years. The Destination Management Plans (DMPs) for areas in South West Wales provide further, local detail about the strategic directions being taken in building tourism and hospitality sectors.
- 3.32 The **Pembrokeshire** DMP ran from 2013-2018 but nevertheless provides insight into priorities for the area. The document highlights the coast line as a significant ‘pull’ factor for the area, and therefore the need to protect natural assets through sustainable practices, and eco-tourism options. In terms of access to a skilled workforce, the DMP reflects wider research in stating that negative perceptions about the industry continue to effect recruitment.⁴¹
- 3.33 The **Swansea Bay** DMP is split thematically: working together, driving quality, tackling seasonality, and ensuring sustainability. Strategic objectives under these headings include:⁴²
- maintaining high quality infrastructure
 - supporting all-weather attractions and activities
 - providing visitor information on sustainable practices and the countryside code
 - encouraging tourism operators and staff to undertake training in sustainable practices
 - attracting and promoting new and existing events throughout the year
 - ensuring new developments consider environmental, cultural, and economic and social sustainability alongside economic prosperity.

⁴¹ <https://businesswales.gov.wales/dmwales/sites/dmwales/files/documents/pembrokeshire-dm-plan.pdf>

⁴² <https://businesswales.gov.wales/dmwales/sites/dmwales/files/documents/swansea-dm-plan.pdf>

3.34 For **Carmarthen**, the DMP outlines a top level ‘vision’ for the area, which emphasises development of a strong place-based narrative (‘reasons to visit’), alongside overall quality improvements in accommodation, business practices, and visitor experiences – to maximise visitor stay length and spend.⁴³ A number of trends are highlighted, including: nature, travel experience, social and personal travellers, authenticity, and short breaks. Priorities for developing the sector outlined in the document, are:

- improving tourism infrastructure
- enhancing the sense of place
- raising the profile of Carmarthenshire
- enhancing tourism product and experience
- improving leadership and delivery

3.35 The **Ceredigion** DMP runs between 2013 and 2020. The strategy outlines three key challenges for the area: increasing competition from other destinations, identifying new markets and capturing business from other domestic destinations, and changing market requirements and all year round aspirations. The strategy also outlines that it is ‘committed to sustainable growth’ and reflects upon a number of cross cutting themes to safeguard the area for future generations: Welsh Language, accessibility, natural environment, long-term value and jobs, research to ensure activities are demand led.⁴⁴

Implications

3.36 This chapter has reviewed a number of ongoing and upcoming developments in the Welsh tourism and hospitality sector – from business growth, rates of entrepreneurship, through to skills gaps and new product development. There are a number of implications for HR

⁴³ <https://businesswales.gov.wales/dmwales/sites/dmwales/files/documents/carmarthenshire-dm-plan.pdf>

⁴⁴ <https://businesswales.gov.wales/dmwales/sites/dmwales/files/documents/ceredigion-dm-plan.PDF>

assets – primarily in relation to sustainable and outdoor skills, entrepreneurship, and soft skills.

3.37 The evidence gathered – and supported by stakeholder interviews - specifically demonstrates the importance of outdoor and adventure holidays to Welsh tourism, alongside training in sustainable management. Existing research has demonstrated an overall lack of outdoor adventure courses in Wales while at the same time, there are many new developments in the sector over the next few years likely to increase demand for these skill sets. An academy – particularly if set in West Wales – could offer specialist training in outdoor adventure sports, while also using the natural assets as a ‘pull factor’ to potential recruits.

3.38 The high rates of business deaths and births in Wales also suggests a strong entrepreneurial culture in Wales. This suggests the academy would be well positioned to:

- provide space for students to develop and test business ideas
- share industry best practice via content development and dissemination
- develop networks of businesses: numerous studies have demonstrated the benefits to entrepreneurship and innovation via collaboration between further/higher education institutions and the private sector

3.39 An oft-cited skills gap among all levels of the industry relates to ‘soft skills’ such as customer service, and team working. This suggests (and as further elaborated in the section below) the academy could deliver opportunities for group experiential learning to foster collaborative working environments.

4. Education and Training Offer

Introduction

- 4.1 This section of the report summarises the findings from a review of existing education and training provision within the tourism and hospitality sectors that is available in west Wales. This includes formal, college-based courses for those preparing to enter the sector, accredited work-based learning for the existing workforce and more informal mentoring or bespoke training programmes.
- 4.2 The purpose of this chapter is to map the existing offer in order to identify any gaps that might be filled by a tourism and hospitality academy. The information has been obtained from an extensive internet search⁴⁵ and stakeholder interviews.

Formal education: Higher and Further Education

- 4.3 Tourism and hospitality courses are currently offered at 17 universities and colleges in Wales (Table 4.1).

Table 4.1: HE and FE institutions in Wales, offering tourism and hospitality related educational courses.

HE Institutions
Aberystwyth University
Cardiff Met University
Glyndwr University
University of South Wales
University of Wales Trinity Saint David, Swansea
FE Institutions
Bridgend College
Cardiff and Vale College
Coleg Ceredigion
Coleg Cymoedd
Coleg Gwent
Coleg Sir Gar
College Merthyr Tydfil
Gower College Swansea
Grwp Llandrillo Menai

⁴⁵ Including the Skills Gateway for Business website and relevant college and university websites.

Grwp NPTC Group
Pembrokeshire College

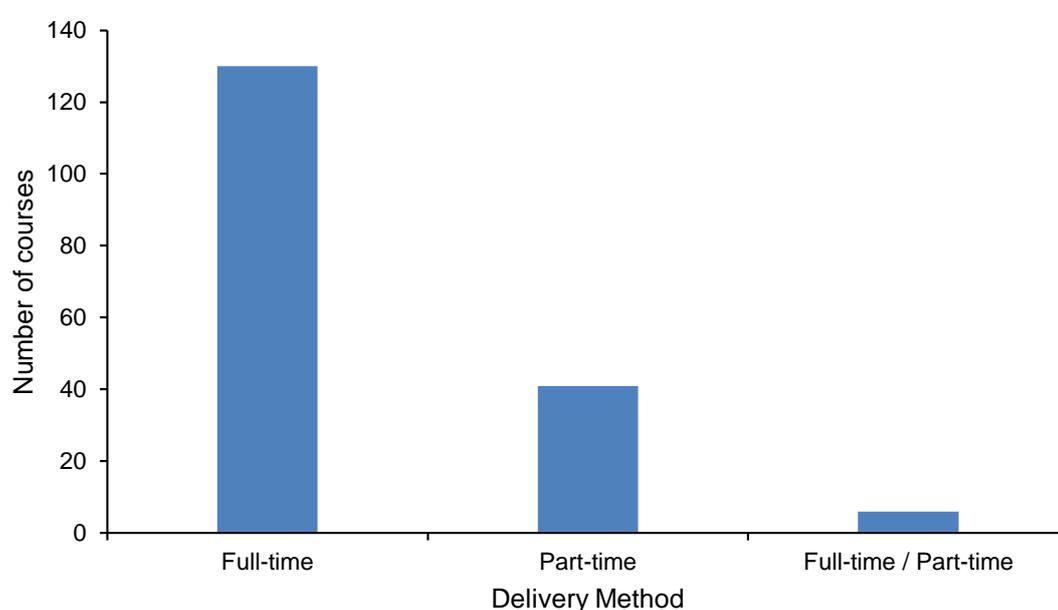
4.4 There are 177 courses related to the tourism and hospitality industry (including some variations) currently advertised in prospectuses and on websites of these institutions. More than 80 per cent of the courses are offered at further education (FE) institutions (153) in comparison to less than fifteen per cent that are offered at higher education (HE) institutions (24).

Full-time, part-time and online studying

4.5 Approximately 73 per cent of courses (130) are offered as full-time programmes, approximately 23 per cent are offered on a part-time basis and only three per cent (or just six courses) can be followed on a part-time or full-time basis (Figure 4.1).

4.6 Notably only three tourism and hospitality courses in Wales are delivered online, and all three are in FE, namely Level 2 air cabin crew diploma, Level 2 holiday rep diploma and travel and a non-accredited tourism diploma.

Figure 4.1: The relationship between number of courses and course delivery method



Source: Miller Research, Welsh HE / FE institutions prospectuses and websites

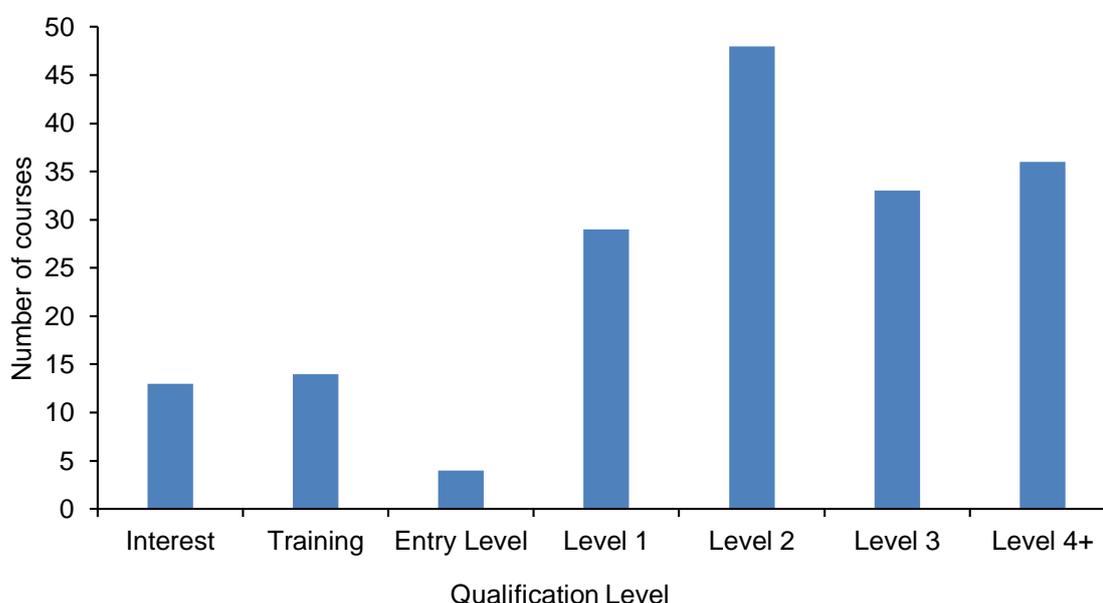
Recruitment and admissions

4.7 In HE, entry requirements for tourism and hospitality courses range from two A-levels at EE grade to three A-levels at BBC grade. Within FE, some courses require no formal qualifications on entry, whilst others stipulate five or six GCSEs at A*-C grade. Some courses are sequential, for example, the requirement for starting a level 3 course, is the completion of levels 1 and 2. Both HE and FE institutions are however willing to accept applicants onto tourism and hospitality courses on the basis of relevant experience or an interview.

Qualification offer

4.8 Figure 4.2 and Table 4.2 below show the distribution of courses by qualification level and the resulting output qualification. HE institutions only offer degree level qualification upon completion of the course (24 courses, Level 4+). In FE, the offer is more varied, and courses range from casual, unaccredited learning to foundation degrees. The highest proportion of available qualifications are at Level 2 (48 courses).

Figure 4.2: Number of tourism and hospitality course against qualification level

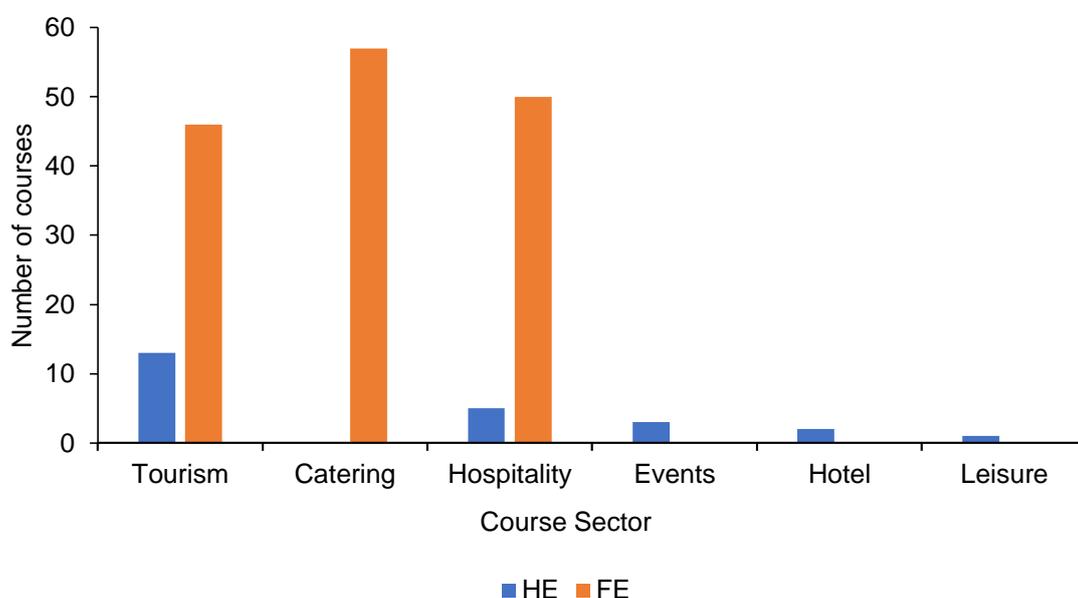


Source: Miller Research, adapted from Welsh HE / FE institutions prospectuses and websites

Sub-sector coverage

- 4.9 Relevant qualifications include broad subjects such as 'travel and tourism', 'hospitality', 'catering' and 'professional cookery'. However also offered many specific courses, such as and hospitality management and culinary arts (Annex A).
- 4.10 In tourism specifically, some of the more specialist courses include training to become a resort representative, air cabin crew certification, a BSc Adventure Tourism Management and a BSc in Tourism Management, which includes a language such as French and Spanish.
- 4.11 In catering and hospitality, some of the specialist courses include Cake Decoration, Specialist Sugar Craft Techniques and Professional Patisserie and Confectionery.
- 4.12 Most courses currently available are in catering and hospitality, and in FE (Figure 4.3). Approximately 60 per cent of the total 177 courses in tourism and hospitality are in FE. Most courses in HE are in tourism.

Figure 4.3: The number of courses at HE and FE institutions against sector subject



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

4.13 Table 4.2 below shows the further distribution of courses by subject sector. Most notable is the high number of ‘hospitality’ and ‘hospitality and catering’ qualifications available in FE, compared with very low numbers of courses in these areas in HE.

Table 4.2: The sub sector breakdown of courses delivered at HE and FE intuitions

Sector Category		Number of courses by Institution Type	
Sector	Sub-sector	HE	FE
Catering	Catering	0	57
Events	Events	3	0
	Hospitality	1	19
	Hospitality & Catering	0	30
Hospitality	Hospitality & Events	1	0
	Hospitality & Tourism	1	1
	Hospitality. Tourism & Events	2	0
Hotel	Hotel	1	0
	Hotel & Hospitality	1	0
Leisure	Leisure	1	0
	Tourism	12	39
Tourism	Tourism & Events	1	3
	Tourism & Hospitality	0	3
	Tourism and Hotel	0	1
Total		24	153

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

Skills offer and relevance to the workplace

4.14 Most of the HE courses include an aspect of management, and therefore prepare graduates for a more strategic career in the tourism and/or hospitality sector. One particular HE course – BA in International Hotel Management – is delivered in partnership with Marriott Hotels, and as part of the course students undertake a placement at a Marriott Hotel, providing an opportunity to develop

work place skills and to gain experience within a globally recognised hotel.

- 4.15 By comparison, FE courses tend to be more practical, providing practical hands-on experiences, for example via an on-site campus restaurant, which gives students the opportunity to develop their skills within a real kitchen / restaurant environment.

In work training provision

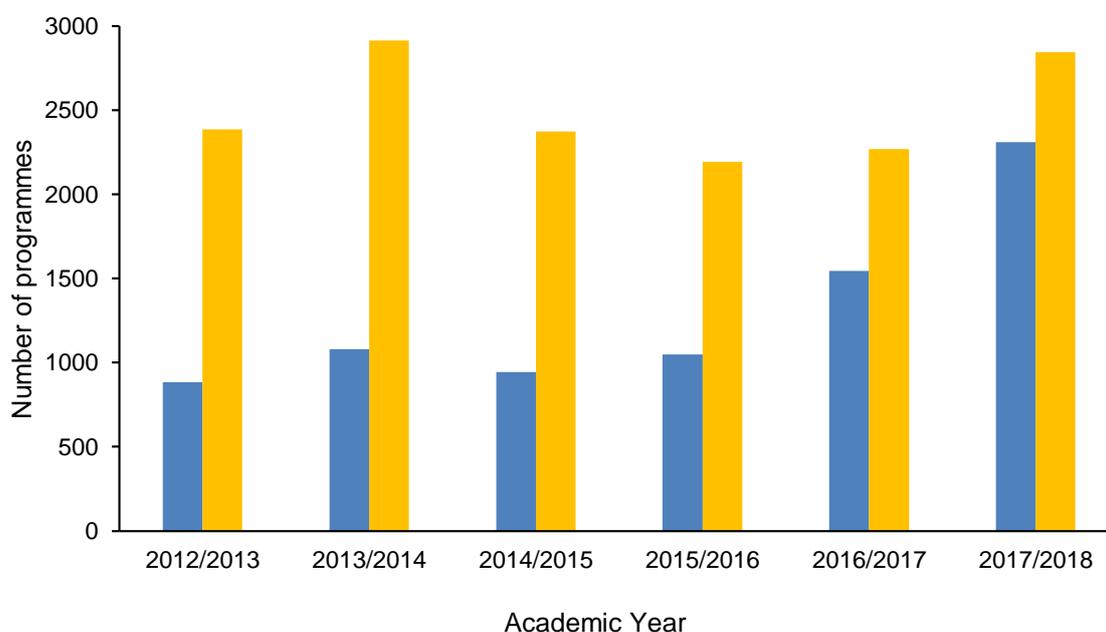
Apprenticeships

- 4.16 Figure 4.4 below shows the number of Foundation Apprenticeships, Apprenticeships and Higher Apprenticeships delivered in Wales in the tourism and hospitality sectors in the previous six years. They are grouped into 'leisure, sport and travel' and 'hospitality'. Whilst hospitality has remained relatively stable in terms of numbers of apprentices (between 2,195⁴⁶ and 2,915⁴⁷) there has been a steady, almost year-on-year increase in the numbers on leisure, sport and travel programmes, rising from 885 in 2012/3 to 2,210 in 2017/8.

⁴⁶ In 2015/6.

⁴⁷ In 2013/4.

Figure 4.4: Learning programmes for Foundation Apprenticeships, Apprenticeships and Higher Apprenticeships, Blue: All leisure, sport and travel; Yellow: All hospitality.



Source: Adapted from StatsWales

- 4.17 Table 4.3 below breaks these figures down into individual apprenticeship programme types. Under leisure, sport and travel, the substantial growth in numbers is almost entirely due to the increasing take-up of play work apprenticeships between 2013/4 and 2017/8, during which period the number of apprentices rose from 80 to 1,400.
- 4.18 Leisure management remained relatively consistent year-on-year whilst activity leadership, which has only been delivered in the last two years, increased from 45 apprenticeships in 2016/2017 to 70 in 2017/2018.
- 4.19 Hospitality and catering apprenticeships account for the bulk of those delivered in the hospitality sector in the last six years. There has been an increase in hospitality management apprenticeships in the last three years: none were delivered in 2014/2015, but between 2015/2016 and 2017/2018, the number of apprenticeships of this type

rose from 50 to 70. Only 45 licensed hospitality apprenticeships were delivered in the last six years and all were in 2013/2014.

Table 4.3: Learning programmes for all apprenticeships divided by sector against academic year

All apprenticeships	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018
All: Leisure, Sport and Travel	885	1,080	945	1,050	1,545	2,310
Active Leisure and Learning	95					
Activity Leadership					45	70
Leisure Management	105	145	105	130	130	135
Leisure Operations	50	40				
Play work		80	125	315	845	1,400
Travel Services	50	50				
Other Sector Frameworks - Leisure, Sport and Travel	55	55	100	95	95	60
All: Hospitality	2,385	2,915	2,375	2,195	2,270	2,845
Craft Cuisine	40	65	65	55	45	.
Hospitality and Catering	2,315	2,780	2,245	2,050	2,120	2,705
Hospitality Management				50	65	70
Licensed Hospitality		45				
Other Sector Frameworks – Hospitality	35	25	65	35	40	70

Source: StatsWales

Other work-based learning in the hospitality and tourism sectors

- 4.20 Other work-based learning in the field of hospitality and catering typically covers regulatory topics such as manual handling, food allergen awareness, first aid and personal licencing, and are offered by a range of training providers and at a range of levels.
- 4.21 Some training providers offer bespoke training courses that are tailored to an organisation’s individual requirements. For example, Engage Training offer “Excellence in customer service”, which covers topics such as:
- Meeting and greeting
 - Establishing requirements
 - Meeting individual needs
 - Different roles and responsibilities
 - Upselling
 - Data Protection Act

- Managing difficult conversations
- De-escalating and handling complaints
- Closing the transaction.

In travel and tourism there are work-based learning opportunities available in leisure and business, tour operations, visitor services and tour guiding. Specific NVQs available include:

- Active Leisure, Learning and Well-being Operational Services
- Tourism Services
- Travel Services
- Principles of Customer Service.

Generic work-based learning opportunities

4.22 There are also more generic in-work training opportunities, which are relevant to the tourism and hospitality sector. For example, Skills for Industry 2, funded through the European Social Fund provides subsidised, sector-specific, work relevant training and advice to businesses in south west Wales in a range of sectors including food and tourism.

4.23 Skills for Industry 2 targets staff with low or no qualifications as well as those with existing qualifications aspiring to Level 3 and above. The programme sets out to support businesses and employers to:

- Overcome any specific labour market and recruitment challenges by raising technical and job specific skills from within.
- Tackle skills gaps in a team and ensure an entire operation is more productive from top to bottom.
- Upskill members of a team who are under qualified and/or under-performing.
- Refresh existing skills across the board to ensure the skills of all staff remain relevant to the business needs.

- Inspire, motivate and provide clear career progression frameworks for staff⁴⁸.
- 4.24 Employers are required to contribute a percentage of the cost of the training depending on the size of their business⁴⁹.
- 4.25 Work Welsh (Cymraeg Gwaith) is designed to support and deliver Welsh language training for the workforce. Businesses of all sizes and sectors in Wales are eligible. The programme is delivered through a variety of mediums, including free on-line taster courses, one of which is tailored for the tourism sector⁵⁰. The programme also includes residential courses, which are designed to build confidence and improve language skills, are tailored for different types of work and suitable for learners at varying levels of ability.
- 4.26 In addition, intensive courses delivered over an extended period are available at any level, are bespoke to the needs of both employers and employees and include vocabulary relevant to the workplace.
- 4.27 The Wales Union Learning Fund (WULF) is available to trade union members in Wales. Trade Unions (for example the Service Industries sector of Unite) are able to bid to deliver training projects of between two and three years focusing on developing the essential skills and employability of the workforce, with a particular emphasis on removing barriers for traditional non-learners.
- 4.28 WULF projects provide the opportunity for employers to work with Trade Unions on developing learning and skills, in order to:
- Encourage wider participation in training
 - Support bespoke workplace training
 - Provide a best practice approach to address essential skills like literacy, numeracy and IT

⁴⁸ This is a summary of the description on the programme on the Skills Gateway website: <https://businesswales.gov.wales/skillsgateway/skills-and-training-programmes/workplace-skills#workplace-skills>

⁴⁹ Small businesses are required to contribute 30%, medium-sized businesses are required to contribute 40% and large businesses are required to contribute 50%.

⁵⁰ Other sector-specific taster courses include health, retail and social care.

- Reduce drop-outs through the provision of additional learner support by Union Learning Representatives.

Mentoring / Coaching opportunities

- 4.29 In addition to the formal and accredited college provision summarised above, there are programmes and initiatives offering training and skills development of relevance to the tourism and hospitality sector.
- 4.30 With support from the European Agricultural Fund for Rural Development, Welsh Government launched the three-year Food Skills Cymru programme in September 2018. The £3 million initiative provides varying levels of funding⁵¹ for the delivery of technical and staff development training to businesses in the food and drink supply chain businesses (excluding retail).
- 4.31 It was informed by Wales: A Food Destination (WAFD) project, which was a two-year pilot that set out to support hospitality and retail businesses to source, serve, and sell Welsh food and drink. WAFD was established as a means to ‘test’ engagement techniques with individuals and businesses working within the tourism and hospitality supply chain in Wales.
- 4.32 Accredited and non-accredited training, E-learning options, ‘bite-sized’ learning and more ‘bespoke’ solutions⁵² are all eligible for funding through Food Skills Cymru, and businesses are also entitled to a free skills diagnostic to inform the creation of a workforce development plan for their organisation. The intention is to deliver training on-site wherever possible to minimise disruption to business activity.
- 4.33 Businesses can be supported via several ways, including:
- Face-to-face discussion with an account manager
 - Helpline
 - Online support

⁵¹ Intervention rates vary between 50 per cent and 80 per cent funding and are in line with complementary support offered through Skills Gateway for Business, Project Helix and Cywain.

⁵² These will be considered on a ‘case by case’ basis.

- 4.34 The programme is still in its infancy and does not yet have a dedicated website; however, the current emphasis is on building up a database of potential beneficiary businesses and an agreed list of training providers who could benefit.
- 4.35 WAFD has continued as a strand under Food Skills Cymru, with the overall objective to enable restaurants, cafes and hospitality venues to source produce from Welsh suppliers, to build a strong 'narrative' for Welsh food and drink, to up-skill chefs and to help shorten supply chains by building links between buyers and suppliers. Support is delivered via a combination of one-to-one surgeries or mentoring, workshops and regional events and an on-line information hub.
- 4.36 Some areas of support provided via WAFD include:
- Sourcing local food and drink products.
 - Use of the Welsh language on menus and amongst staff.
 - Applied customer service training, including awareness and promotion of provenance.
 - Promotion of Welsh products in menus and on social media.
 - Signposting to Mentrau Iaith for free translation of menus and marketing materials.
- 4.37 There are many benefits
- Match the skills of employees to the skills needed
 - Reduce staff turnover
 - Increase diversity
 - Up-skill existing staff
 - Raise staff morale
 - Improve productivity
 - Attract the best candidates
 - Create a talent pipeline across your organisation
 - Improve company image

Implications

- 4.38 The section above provides an overview of the type of training and skills support opportunities currently available to tourism and hospitality businesses and to the existing and prospective future workforce in the sector. For existing businesses, there is support for developing cultural identity and local supply chains; however, what is available in the mainstream education sector tends to be more conventional; catering Apprenticeships based around French cuisine, generic customer service training and inadequate emphasis on the importance of provenance and sourcing local produce.
- 4.39 What is needed instead is training that is responsive to current trends and issues in food and drink (for example veganism, allergen awareness and concerns about food miles) as well as skills development in the preparation of Welsh cuisine and the use of fresh, locally sourced and high-quality products.
- 4.40 Training is also quite siloed; courses are available in ‘leisure and tourism’ or ‘hospitality and catering’, whilst there is nothing to prepare students more holistically in terms of utilising the local culture and physical landscape in order to develop innovative and unique tourism businesses: *“courses are too generic ... not responding to business needs.”* (Stakeholder interview).
- 4.41 Furthermore, not all existing businesses recognise the importance of investing in staff training and development. It is widely accepted that hospitality and tourism is seasonal and that the workforce, by definition is transient. A disincentive to invest in workforce development undermines commitment and therefore retention, and so the problem becomes self-perpetuating: *“Some businesses just accept high turnover of staff, and then don’t invest in training – which makes people less committed.”* (Stakeholder interview)
- 4.42 More needs to be done to persuade businesses to value training and skills development in order to cultivate a USP and retain loyal staff who can relay the ‘story’ behind the product they are serving and the environment in which they are based. Some tourism businesses are

already doing this; for example, at one cultural attraction, all staff, from kitchen hands to managers are taught about the history of the attraction as part of their induction programme to ensure they are aware of and can communicate its story.

- 4.43 Linked to this is the need for applied or bespoke customer service training that provides people with the skills to personalise the service they provide to customers and guests, to promote cultural assets and to think laterally in providing a service. There is also a marked gap in training in adventure tourism and outdoor activities (outside of HE), which would be highly relevant to west Wales.
- 4.44 The delivery method for most of the existing training in the sector is traditional, classroom based and leading to a formal qualification and there is very little online training available. In order to appeal to a younger and diverse future workforce, who are looking for fulfilment and adventure, training need to be innovative, fast-paced and varied: *“it [training and development] needs to be a mixed palette”* (Stakeholder interview)

5. Virtual Learning Environments

Introduction

- 5.1 This section of the report summarises the findings from a review of current provision of education and training that takes place using technology to create a virtual learning environment (VLE).
- 5.2 This includes a number of different types of training models including: a content and support model, a blended model, mass open online courses (MOOC's), mobile apps, online content platforms, virtual reality (VR), and existing provision in Wales that harnesses such technologies.
- 5.3 The purpose of this chapter is to consider some of the opportunities and challenges of employing VLE's for training within the tourism and hospitality sector. The information has been extracted using desk-based research to understand the current role that VLE's have when offering a course of training.

Background

- 5.4 Educational delivery methods have become increasingly diverse as educational training attempts to create a dynamic learning environment that better engages learners. The increasing use of technology to enhance and, in some cases, replace the classroom setting offers a number of advantages that could be utilised within the tourism and hospitality sector. Critically however, many of the benefits of VLE's can be lost if the medium is not properly utilised.
- 5.5 Online delivery of education and training has become increasingly popular for a number of reasons:
- It can be **extremely flexible for learners** who have considerable freedom in which to customise their own training experiences by choosing how and when the learning can take place.
 - It is **efficient and economical as well as scalable**. Online material is far cheaper to deliver than physical

ones and access can be opened up to a large number of people without the logistical issues of where to teach them. Furthermore, learners need not be within travelling distance of the host institution at set times.

- Online material can be of a **superior quality** with resources for online learners delivered by those with world leading expertise. Learners also can be provided with instant feedback that can lead to improvements in their own learning.

5.6 A number of challenges are posed when delivering online content for learners that wouldn't normally be the case in a traditional learning environment, such as:

- Online learners **can require more support** than a traditional learner as they do not have regular contact with other learners and the deliverer of the courses content, which can lead to learner's feeling relatively isolated.
- **Technical issues** with computers can have a serious impact on the ability of learners to undertake a course of education or training.
- The flexibility granted to learners requires a level of **self-motivation** to overcome some of the challenges of learning in a virtual environment.

5.7 The tourism and hospitality sector are facing a challenge surrounding recruitment and retention, with issues of a low qualified workforce, susceptible to moving out into other sectors; an ageing workforce, moving towards retirement; and low wages, limiting the appeal of the sector. Training and up-skilling workers within the tourism and hospitality sector is necessary to overcome such barriers, and online learning can offer an opportunity to overcome some of the logistical challenges that the sector faces in terms of delivering skills training.

Types of Virtual Training

Content and Support Model

- 5.8 A content and supply model of delivering a training course involves utilising online content when providing course resources, interacting with course leaders and stimulating discussions. The model benefits from allowing learners to utilise technology within a classroom environment by providing access to course content through online portals. In most cases, physical course content is replaced by online resources and discussions that can take place through online forums. As the content is separated from the support, it is possible to change the way in which support is provided whilst leaving the content unchanged as the online component performs a peripheral role. This type of course still relies on the use of a physical learning environment and therefore, cannot be easily scaled as it is dependent on face-to-face contact. The model is often employed for use with localised staff development courses that draw on a central bank of training materials available to all staff within a particular institution.
- 5.9 An example of a ‘content and support model’ is the THINK institute in Amsterdam⁵³.
- THINK 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.
 - Many of the materials are available online, forums are filmed for sharing and taster courses can be accessed remotely. THINK has also developed satellite hubs in Vancouver and Lisbon.
 - THINK Institute, therefore, relies on the physical ‘school’ to engage with entrepreneurs and deliver a course of training but this is supplemented with online

⁵³ <https://www.thnk.org/>

materials that utilise some of the benefits of technology.

Blended Model

5.10 A blended model for content delivery utilises centrally written and held materials but incorporates within the learning process the use of online discussion and collaborative activities. Online interactions are more important to the delivery of the course and the delivery medium is wholly or primarily online, though perhaps still incorporating non-online elements such as face-to-face tutorials. Generally, blended courses require an online component for completion of the course. Such a model provides a mix of face-to-face and online self-study that offers a degree of flexibility that is not the case with a 'content and support' course. For professional development training, a blended model can require participants to access training materials and engage in self-learning before further engagement with other participants. Discussion groups, therefore, become an integral part of the learning process and require participants to engage with each other as a form of learning. As part of such a course, participants might be involved in the production of some learning material using the skills provided by the training materials, and ideas formulated in the discussion areas. This type of model would support learning on quite a large scale, with participants being assigned to small tutor groups where they form close working relationships with a small group of peers (chosen to be of similar background – subject and previous experience).

5.11 An example of a blended Model is Virtual College⁵⁴.

- Virtual College is an online training and learning management website that allows users to undergo online training courses for individual training and skill development. These courses range from topics such as food and hygiene to health and safety and allow

⁵⁴ <https://www.virtual-college.co.uk/>

users to gain accreditation certificates and qualifications.

- Virtual College has been used by Go Ape⁵⁵, the largest UK forest adventure activities provider, to upskill some of those within their existing workforce to become deputy managers.
- Go Ape's use of Virtual College to train staff for a new role within their business meant that they were able to provide a consistent quality of messaging and delivery across its 28 sites throughout the UK.
- The seasonal nature of Go Ape's business has required that training only taking place outside of the busiest periods of the year, but the online training course provided by Virtual College means that training can take place throughout the year.
- Workers who underwent the predominantly online course were rewarded with City & Guilds accreditation.

Massive Open Online Courses (MOOC's)

5.12 A massive open online course model for training provision is one that relies solely on online learning. It allows for online communication, collaborative online working and access to a database of resources that fundamentally changes the course of education or training compared to that within a physical classroom environment. Such a model incorporates delivery and management of course materials, administration, assessment, communication, resources, and support facilities fully online. In an integrated course, there is inherently less use of static learning material and more emphasis placed upon the establishment of a community of learners. Learners who undertake a MOOC are relied on to be active learners and too collaborate with others undertaking the same course. Fully integrated online courses

⁵⁵ <https://www.virtual-college.co.uk/case%20studies/2016/go-ape>

are currently used to provide courses that can allow learners to attain new skills over a short-period of time, courses that specialise in a given subject that can allow for certification, and degree-level programmes over a number of years.

5.13 An example of a provider offering massive open online course of education and training is Coursera⁵⁶.

- Coursera has partnered with a number of universities and other organizations to offer online courses, specializations, and degrees in a variety of subjects. It has more than 33 million registered users and more than 2400 courses.
- Coursera courses last approximately four to ten weeks, with one to two hours of video lectures a week. These courses provide quizzes, weekly exercises, peer-graded assignments, and sometimes a final project or exam.

Mobile Apps

5.14 Mobile applications are increasingly being used when providing both formal and informal education and training. Some apps mimic the structure of video games in an attempt to engage participants in educational content, this includes: a reward system where participants can build up in game currency to be spent on features such as character customisations or bonus levels, public leader boards so that users can compete against friends and other learners, and achievements and challenges to complete particular objectives. Some apps are currently being used to encourage social learning with learners engaged in interactive quizzes or game-playing through screen-sharing. Another type of educational app is one that hosts educational content in the form of instructional video and personalised

⁵⁶ <https://www.coursera.org/>

learning content that empower learners to study at their own pace in and outside of the classroom.

5.15 An example of these different types of educational apps includes:

- **Duolingo**⁵⁷ – Duolingo is a free language-learning platform that engages learners in 85 different language courses through video game like lessons. There is a reward system in which in-game currency is earned through completing ‘lessons’ that can then be spent on in-game features to unlock bonus levels. The app has acquired over 300 million registered users worldwide.
- **Kahoot!**⁵⁸ – Kahoot is a game-based educational learning platform which allows multiple users within a classroom setting to participate in multiple-choice quizzes. It is designed to support social learning and can be used to review student knowledge or for formative assessment.
- **Khan Academy**⁵⁹ – Khan academy provides a personal learning experience built on providing instructional videos alongside written resources. The videos display a recording of drawings on an electronic blackboard, which are similar to the style of a teacher giving a lecture. The narrator describes each drawing and how they relate to the material being taught. The Khan Academy website supplements the videos hosted on the app with progress tracking, practice exercises, and teaching tools.

Online Content Platforms

⁵⁷ <https://www.duolingo.com/>

⁵⁸ <https://kahoot.com/b/>

⁵⁹ <https://www.khanacademy.org/>

5.16 Online content platforms are an accessible way to provide a large number of short training videos and course material to a large number of people in an accessible way. An example of an online content sharing platform within the tourism and hospitality sector is Typsy⁶⁰.

- Typsy specialises in providing online video training hosted by hospitality instructors from all over the world.
- The site hosts over 300 short skills training videos that address some of the needs of the hospitality sector.
- Videos range in categories from culinary, beverage, service, marketing, management and business.
- Typsy is priced at US\$9/month for individual users, with businesses charged US\$139/month per venue, with up to 50 staff per venue.
- Businesses can create training schedules to send to staff, with the Typsy dashboard then allowing them to measure how staff are performing. Businesses can send out Typsy courses or upload their own training videos for staff.
- Individuals can create a profile and complete single video lessons to earn skill credits, or complete a course to earn a certificate, with their learning achievements then showcased on their profile.

Virtual Reality (VR) Training

5.17 Virtual reality can be utilised to provide an immersive environment in which to undergo practical forms of training that provide a more realistic training experience for a worker. Hilton Hotels⁶¹ are currently utilising VR training to train their corporate hotel employees to understand the work that takes place within their hotels.

⁶⁰ <https://www.typsy.com/>

⁶¹ <https://www.instituteofhospitality.org/virtual-reality-gets-real-for-hospitality/>

- Workers use Oculus Rift goggles that are linked up to a high-end gaming laptop to go on a guided journey of different departments within the hotel.
- This can include the restaurants, kitchens, housekeeping areas and the boiler room.
- Workers are then trained to undertake routine operational tasks such as cleaning a guest room, building a room service tray and checking in rewards programme guests at the front desk.
- The results of what was initially a pilot project, which involved 100 members of staff over two days, have been promising, with 87% of participants saying they now have greater empathy and appreciation for team members working in the hotel environment and 78% anticipating the experience will impact the work they do at the corporate office.

Existing delivery in Wales

*Go North Wales Tourism and Hospitality Academy*⁶²

- 5.18 The Go North Wales Tourism and Hospitality academy is operated by North Wales Tourism in partnership with universities and colleges across North Wales. The academy seeks to encourage more recruits into the tourism and hospitality sector by bringing together first-time students, hospitality employees, employers and colleges across the region.
- 5.19 The academy has run a series of workshops, behind the scenes learning journeys, and networking events as well as regularly producing newsletters for participants.

⁶² <https://gonorthwales.academy/>

- 5.20 Alongside the academy they have launched a virtual academy with a web portal showing job opportunities, and for connecting students to work experience opportunities.

*Do Lectures Wales*⁶³

- 5.21 The Do Lectures is an annual event hosted in Cardigan in West Wales in 2008. The lecture series runs over three days and involves talks that cover topics as diverse as education, sustainability, well-being, food and design.
- 5.22 Speakers conduct talks that attempt to disseminate ideas and stir people into action which has attracted a large audience with over 200 of the lectures available online. By broadcasting lectures via the internet, Do Lectures hope to inspire a large number of people with viewers from 201 different countries and an audience of between 500,000-1,000,000 people.

⁶³<https://www.thedolectures.com/about>

6. A Sustainable Tourism Academy

Rationale for the Academy

6.1 The brief for this research was based on earlier discussions amongst partners regarding many of the issues rehearsed above. It was recognised that there was a need “to provide an innovative solution to the talent shortfall and apparent image crisis of the tourism industry”.

6.2 This report and the preceding WP1 report have laid out the drivers of the need for change, which are in turn summarised in the executive summary of this report. Key to these are:

- Trends in the industry: There is significant tourism development activity in Wales at present, much of it focused on the outdoor activity sector. The importance of entrepreneurship is also emphasised – both for those operating businesses and for employees.
- Market characteristics and visitor numbers: There is a continuing trend towards short breaks focused around activities and drawn towards coastal areas.
- Tourism and hospitality as a career: Enlightened employers recognise the need for a culture change to being more supportive of employees to build retention. It was also recognised that the millennial workforce is often transitory and to use that to the industry’s advantage.
- Lessons from best practice: There are many examples of innovative, flexible approaches to learning in tourism and other sectors, which could provide a baseline for developing a novel approach based around sustainable working.

6.3 These and other factors have underpinned our thinking in devising a way forward for the academy.

Vision

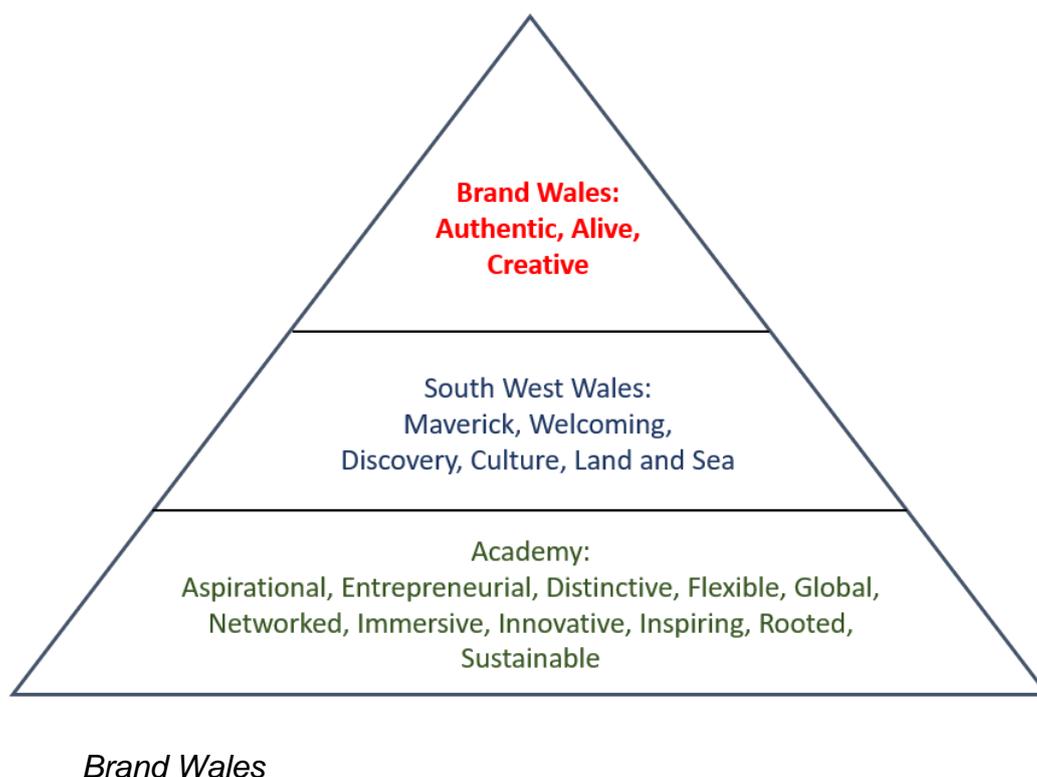
6.4 Early discussions around a vision had a number of components, including:

- Creating an industry-led vocational training academy
- Creating a 'shop window' that will enthuse people to pursue a career in tourism.
- Serving as an industry hub that will ultimately drive up standards
- Providing high quality training and skills development and sharing of best practice, and collaboration.
- Offering practical training, professional internships, paid international work placements & exchanges and sustainable careers with clear progression pathways.

Values

6.5 It was agreed from the outset of the research that the Academy should be driven and informed by a strong set of values, relating to Wales, South West Wales in particular, and to the key audience segments.

Figure 6.1: Values Hierarchy – How the Academy Relates to the Context



6.6 Brand Wales is a universal brand, covering all aspects of the Wales offer, from tourism, through food and drink to business investment and exports. The brand purports to be “alive with opportunity, innovation and adventure; inspired by nature and driven by creativity”. The essence of the brand is that it conveys a balance between Wales and the World; local and global, *bro* and *byd*. The brand sets out to deliver on five objectives, which can be both relevant to the Academy and help to inform its ultimate design. These are:

- Elevate our status
- Surprise and inspire
- Change perceptions
- Do good things
- Be unmistakably Wales

The brand is distilled down into three core values, which are intended to underpin all sectors, and which provide a useful baseline for delivery. These are:

- Authentic – Open, honest, the real deal. Caring deeply for community and culture
- Alive – A new Wales, looking to the future with responsibility and creativity
- Creative – A rich and enduring culture overlaid with bright new ideas

6.7 From our desk research and interviews with stakeholders, it is clear that a proportion of the tourism sector is committed to these values and this is reflected in their businesses. However, it is also apparent that a wider cultural change is needed amongst much of the sector to refocus on consumer demands and expectations for a 21st century Wales.

South West Wales

6.8 The initial Steering Group workshop for the project identified a range of values that applied to West Wales and which could underpin the ethos of an academy. These included:

- Unorthodoxy; the region was perceived to be at its best when acting as a maverick – celebrating individualism and quirkiness.
- Discovery; a region full of surprises, unsung treasures and rich, ancient history and culture.
- Welcoming; a people willing to engage with and accept strangers with natural hospitality.
- Land and Sea; where the land and seascapes are beautiful, unspoilt and ruggedly wild.

6.9 Stakeholders added to these, with a strong emphasis on sustainability – protecting and being known for engaging with and protecting the excellent land and seascape of the region. The natural asset base extends to food and drink and this should be celebrated through hospitality, events and experiences. The stakeholder workshop concluded that this makes business sense, as the demand for socially and environmentally sustainable businesses and experiences will be likely to increase, given the views of Millennials and Generation Z. It was also pointed out that a nation, region and industry with a reputation for true sustainability would be more likely to attract staff from this same age group.

The Academy

6.10 From the initial Steering Group workshop and subsequent stakeholder interviews, we have drawn together a set of core values which will both define the nature and underpin the culture of the Academy. We suggest that these should encompass the following:

- Aspirational – Raising the ambition of the tourism sector and its people across South West Wales and the nation as a whole.
- Entrepreneurial – Building a vibrant culture of tourism businesses fit for the 21st century in the region.

- Distinctive – Adding to and building on existing training provision by presenting a unique offer tailored to the values of the region.
- Flexible – Offering a range of levels and delivery models to meet the needs of all learners and ensure a sustainable business model.
- Global – Benchmarking the region and ensuring delivery set against the best in the world.
- Networked – Linked into like-minded businesses and providers across the sector, both in the region and beyond.
- Immersive – Delivering learning through doing, working on real world projects and developing skills that deliver for employees and business alike.
- Innovative – Encompassing digital and virtual skills and ensuring that all content is both in line with the latest in emerging practice.
- Inspirational – Working with sector leaders across the industry and supply chain to inspire and motivate learners to become excellent.
- Rooted – Delivering in the context of the region and building close relationships with the employer network
- Sustainable – Developing best practice in sustainable delivery of tourism, in line with the values of Wales and the region.

This longlist will provide both a guiding framework and a means of monitoring success for the eventual delivery of learning.

Structure

6.11 Through research into best practice and industry interviews, we suggest there are three main options for the delivery structure for the Academy; each with its advantages, challenges and resource implications. These have been characterised as:

- A physical establishment. This would be the gold standard for an Academy, providing an iconic focus for the industry to

encounter best practice, to use as a sector resource, to meet others for collaboration and to create a community learning space. Ideally this would encompass, as a minimum, learning rooms, a student-run bistro café, studios for live streaming and space for meetings and casual interaction. It should be sited in a location convenient to the whole region and would ideally be co-located with a tourism business or existing provider (subject to maintaining independence). Although requiring considerable investment, it would potentially be able to attract substantial fee income if targeted appropriately, and there would be additional opportunities for industry sponsorship, online sales and partner contributions.

- Networked delivery. This would be a lower-cost approach, using existing facilities as teaching and learning spaces. These could be within existing institutions or tourism businesses, with a blend of live classes and web-streaming / virtual learning to meet the needs of different groups of learners. It would not offer the same levels of networking and collaboration that could be achieved in a wholly physical venue but could nevertheless bring learners together for occasional events to build networks.
- A virtual Academy. This would be the lowest cost approach, presenting shared content to subscribers online. The advantage of online learning is the flexibility and lower cost to employers in terms of time as well as fees. However, it does not suit all learners and lacks the advantages of the more immersive possibilities of physical delivery.

Target Audiences

- 6.12 The initial scoping for this research identified four key audience groupings for the academy, based on potential sources of labour and skills for the sector.

Millennials and Generation Z

6.13 Millennials are those born between 1981 and 1996, while Generation Z comprise those born between 1997 and 2010. This group is said to already comprise 35 per cent of the workforce which will increase to 46 per cent by 2020. While the ages and needs of these groups range considerably – there are a number of common traits associated with these generations and their attitudes towards employment and careers.

- Often crave “meaningful experiences” through employment and travel and not motivated by money alone.
- Highly entrepreneurial and intolerant of poor performance or leadership.
- Face a competitive jobs market, and an uncertain future
- Often already have ‘one foot out the door’.
- ‘Digital natives’ - integrate technology into their day to day activities and work practices, such as social media and prioritising / scheduling tasks.
- Prioritise social and environmental responsibility.
- Flexible working – location and hours.
- Often thrive in team working and collaborative environments.

6.14 Hence this group have a lot to offer, but need to be attracted by interested, meaningful work and cannot be expected to stay with one employer for life. Restaurateurs see this group as a key source of front of house staff, for example.

6.15 One subset here is that of gap year students and local undergraduates during the holiday season. Several stakeholders agreed that these provide a useful source of skills and should be seen as a lasting, albeit changing, resource that should be capitalised upon.

Older Staff and City Returners

6.16 This group comprise those who may be looking for a new career due to a change in life circumstances, such as bringing up a family, health, or disillusionment with their current industry. Alternatively, they may

be early retired, bringing high levels of skill, with some wanting to work to pay the bills or to keep busy rather than focusing on developing a career progression.

- Job security a priority for this group
- Are likely to be more highly skilled and need less training
- Will have transferable skills (such as management)
- Are able to mentor younger / less experienced members of a team
- Work / life balance and location are likely to be high priorities
- Are likely to expect more formal / traditional working hours and routes to career progression

Existing Workforce

6.17 The existing workforce could be any age or skills level. However, if employers are to compete and respond to the challenge of delivering a values-based sector for the industry in South West Wales, it will be important to continuously upskill staff to embrace new thinking in the industry.

- Already skilled in some aspects of the industry
- May be disillusioned with lack of career progression
- May be on low pay or in insecure / seasonal work
- Limited access to training
- Feel pressure to work somewhere with associated prestige
- May have good knowledge of the different roles and how they intersect within an establishment (e.g. a restaurant)

It was identified that some of this group have the potential to develop substantially and drive businesses forward, through appropriate training and development.

The Unskilled

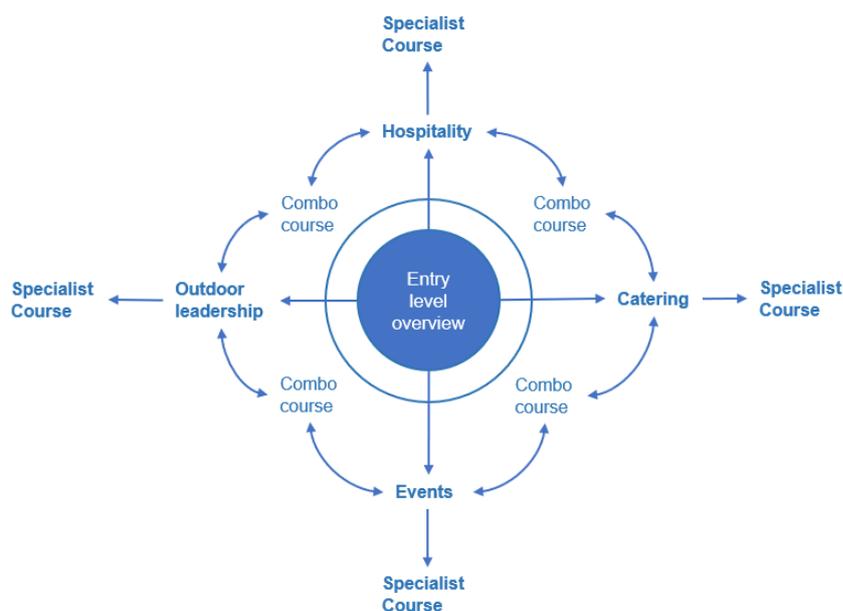
6.18 Existing training providers suggested that disengaged learners are frequently steered onto tourism and hospitality courses as a last resort, impacting on the perceptions of such courses and

consequently on attitudes towards careers in tourism as a whole. There may be an opportunity to devise experiential learning for this group in a real workplace setting, to inspire and motivate at-risk individuals for a career in tourism.

Training and Learning

- 6.19 The following section of the report lays out some initial thoughts on what training and learning could be delivered by the academy; combining variables for audience group, structural nature of the academy and approach to delivery.
- 6.20 One aspect that is not covered in the following section is that of flexibility and customisation. We consider it essential that the academy provides a mix of specialist modules with the ability for learners to draw on these in bespoke manner, to devise their own experiences and outcomes.

Figure 6.2: Schematic of specialist course interactions



- 6.21 The detailed content will be worked up in WP3 and will depend to some extent on the nature of the academy, industry partners engaged, and funding models pursued.

Entry Level Course

6.22 A future academy could recruit school leavers and those looking for a career change to the sector by offering an entry level course of training. A qualification awarded after pursuing such a course would recognise the acquisition, by students, of the basic knowledge and skills to apply them to the practicalities of work within the tourism and hospitality sector. Such a course would allow the academy to overcome the barriers of recruiting new employees.

	Physical Space	Blended Learning	Virtual Course
Admissions	<p>The entry level course would be for school leavers and people with experience of work who are looking for a career change.</p> <p>It may also meet a philanthropical agenda by offering an appealing career pathway for young people who are disengaged or NEET⁶⁴.</p> <p>Formal qualification requirements would be minimal, although GCSE English or Welsh and maths would be essential. More critical requirements would include:</p> <ul style="list-style-type: none"> • Critical thinking and communication skills • Ability to self-manage and be a self-starter • Desire for personal and professional growth • Interpersonal skills and self-awareness. <p>Prospective candidates would be interviewed by a small panel and would also need to participate in a half day assessed group activity, to test team working and communication abilities. Experience of working in the sector would not be necessary.</p>		
Delivery	The course would be delivered via a combination of classroom-based theory lessons, practical workshops and placements.	Blended learning options would include a combination of online and face-to-face training.	The virtual learning would suit people who have existing work or caring responsibilities as well as opening the course up to people from all over the UK and abroad.

⁶⁴ Not in education, employment or training.

	<p>There would be an ethos of good work-life balance, whereby students are encouraged to engage in cultural (for example music, dance and drama) and sporting (for example coasteering, horse riding, surfing and rock climbing) activities available locally.</p>	<p>This would appeal to learners with other commitments and those with concerns about the carbon footprint associated with daily travel to a physical academy.</p> <p>Learners would be encouraged to communicate and collaborate on projects electronically, to ensure they are still developing team working expertise.</p>	<p>Courses would be delivered through an online portal, with a series of modules that could be completed in students' own time. Learning would be delivered via recorded lectures and demonstrations from industry experts.</p> <p>One-to-one support would be available through an online mentor.</p>
<p>Curriculum</p>	<p>The initial part of course would cover all areas of tourism and hospitality to an elementary level including:</p> <ul style="list-style-type: none"> • Customer service • Food and drink • Local sourcing • Events management • Business management and marketing • Outdoor activities • Sustainable tourism • Culture and language <p>The curriculum would also include regular day trips out to suppliers and examples of industry best practice and opportunities for shadowing people already working in the sector.</p> <p>The second part of the course would provide an opportunity for students to specialise in areas of most interest to them. This would involve an extended period</p>	<p>A blended learning course would also cover the following areas of tourism and hospitality to an elementary level:</p> <ul style="list-style-type: none"> • Customer service • Food and drink • Local sourcing • Events management • Business management and marketing • Outdoor activities • Sustainable tourism • Culture and language <p>Each area - or module – would involve a combination of online lectures, self-learning and research and face-to-face teaching, alongside</p>	<p>A virtual course would cover the same topics, but with far greater emphasis on self-learning.</p> <p>Students would still participate in an extended period of work experience during the second part of the course.</p>

	of immersive work experience and a project based around developing a hypothetical business start-up.	industry visits and an extended period of work experience.	
Mentoring and Coaching	Students would be supported to mentor each other, as a means of building camaraderie and sharing learning and experience. This would include regular one-to-one sessions and group discussions. Mentoring via Skype could also be provided by academy alumni in the future.	Students would be supported to mentor each other using a combination of face-to-face and Skype sessions. Mentoring via Skype could also be provided by academy alumni in the future.	Students would be supported to mentor each other via Skype as a way of building relationships. Mentoring via Skype could also be provided by academy alumni in the future.
Career Progression	Students would be supported to secure work in their chosen field, building on the contacts they have made during the course and via the networks available to the academy.		
Network	Students would be encouraged to remain part of the academy alumni, providing opportunities to network with each other, become mentors to future academy students and offer work experience placements.		

Elite Entrepreneurship Course

6.23 An elite entrepreneurship course within the academy could help contribute to shifting the perception of the tourism and hospitality sector as offering no career progression, being low-skilled, and low paid. Recruiting those who already have a high level of experience working within the sector and developing their skills would encourage staff retention within the existing workforce by better improving career prospects. The prestige associated with undertaking such a course would have the potential to create a network of elite workers operating within the tourism and hospitality sector.

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

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

Gap Year Course

6.24 The tourism and hospitality sector relies heavily on young workers who are difficult to retain. A course offered specifically for those who intend to leave the sector after a short period of employment would allow the industry to embrace the issue of retention of the workforce rather than suffer with it. A short, intense course for such a demographic would allow workers to operate to the industry’s short term needs as well as shifting perceptions for those who may continue to work within the sector long-term.

	Physical Space	Blended Learning	Virtual Course
Recruitment	<p>There would be a strong social media presence, and links with further and higher education institutions providing options of pursuing a gap year course. The course would emphasise natural assets, learning about sustainability, and the opportunities provided by the industry including seasonality (e.g. working six months in a surf beach in Pembrokeshire before doing a ski season in the Italian alps).</p> <p>The target age group would be those aged between 18 and 24, although there wouldn’t be any formal age restriction. No prior experience in the industry would be necessary, but applicants would be expected to submit a short form or personal statement outlining their ambitions for their gap year. This would enable the academy to work with the students to find suitable placements upon completion of the course.</p>		
Delivery	<p>The course would last approximately 10 weeks and provide students with two-week rotations across the different aspects of the tourism industry.</p> <p>Each week, the students would attend lessons or placements between Monday to Thursday.</p> <p>The academy would link with local outdoor adventure facilities (e.g. surf schools, climbing, orienteering, kayaking) and offer students the option to undertake courses on these on Fridays and Saturdays.</p> <p>There would be a strong social element to the course, which could be delivered via:</p>	<p>Blended learning options would provide some online and in-person training. This would offer a high degree of flexibility for those with employment commitments, or geographical barriers.</p> <p>The course would predominantly be delivered online – with modules delivered via video and recorded lectures.</p> <p>The course would involve a one day a week presence at the</p>	<p>A virtual course would be useful to those who have geographical and / or work commitments that prevents them from attending a physical location.</p> <p>Courses would be delivered through an online portal, with a series of modules. Students would be able to select the time period that they require to complete each element. Content would be delivered via:</p> <ul style="list-style-type: none"> • videos • recorded lectures • online quizzes / tests

	<ul style="list-style-type: none"> • shared on-site accommodation • group outdoors activities (above) • social media networks • encouragement of internal group activities (e.g. shared meals with students and staff) 	academy, to apply what they have learnt through remote learning.	One to one support would be available through a mentor, online.
Curriculum	<p>There would be a number of core content modules (e.g. kitchen health and safety, customer service, and housekeeping) which would make up the first eight weeks of the course. In the final two weeks, there would be four options in which students can specialise in:</p> <ul style="list-style-type: none"> • basic culinary skills • management and leadership • social media and marketing • sustainable business practices 	The core content modules (described to the left) would be the focus of the blended learning course. They would be delivered online with one day a week at the academy to gain practical experience.	<p>A virtual learning course would not provide the same level of exposure to different elements of the tourism industry but could provide online content that may be helpful for individuals. These may include:</p> <ul style="list-style-type: none"> • CV and careers modules • Kitchen health and safety • Leadership and management • Virtual reality – customer service and housekeeping
Mentoring and Coaching	The aim of mentoring for this course would be to provide guidance on applications and help scope out job opportunities when travelling.	The academy would provide online content and links to advice on job applications. There would be a potential for online mentors to provide one-to-one guidance and feedback to course participants.	
Career Progression	<p>This course does not aim to fill work placements within the Welsh tourism sector but address negative perceptions of working in tourism and hospitality.</p> <p>It is envisaged that some (but not all) will continue to work in the tourism and hospitality sector long-term.</p>		
Network	<p>Rather than establishing a formal network of industry experts, there would be a strong social element to this course, and it is expected that friendships would be made that last beyond the scope of the course. For example, students may go on to travel abroad together.</p> <p>In terms of industry links, there may be opportunities for the academy to pair up with employers (UK or international) to help provide a supply of season labour.</p>	It is unlikely that a virtual or blended learning academy would establish close personal relationships in the same way a physical space would. Nevertheless, social media and online portals could provide a useful space for attendees to share career advice and experiences, and useful travel information (e.g. visa applications).	

In Work Training

6.25 The aim of an in-work training course would be to provide employers the opportunity up-skill their existing workforce by sending their staff on a training courses that is specifically tailored to the operation of their business. For example, content could be about local sourcing and how to market Welsh produce with a narrative that reflects the local area and business ethos.

	Physical Space	Blended Learning	Virtual Course
Recruitment	The in-work training modules would be driven largely by business demands and economic trends that shape demand for the sector. A wide range of specialisms will be offered on a part-time basis, with the option to study full-time during the low season (October to early December, January to March). The courses would be open to individuals with a wide range of experience and would be marketed at employers and the existing workforce. Within the course, there is the opportunity to develop industry partnerships – by sending students on ‘away days’ to learn best practice and develop new ideas / products / processes they can bring back to the industry.		
Delivery	<p>Each module would last approximately two months. Students would be expected to attend the academy once a week (around work commitments). They may work with their employer during working days to ensure any objectives or training objectives are being met. The course options would be extended versions of that offered by the elite management course, and could include:</p> <ul style="list-style-type: none"> • outdoor leadership • menu planning and design • craft food • sustainability values • cultural backstory • event management • understanding customer trends • digital marketing and engagement 	<p>Blended learning options would provide some online and in-person training. This would offer a high degree of flexibility for those with employment commitments, or geographical barriers.</p> <p>The course could offer more of a flexible approach to in work training. Students could select and choose short courses / day training within industry and the academy. It would develop understanding and experiences, through tailored made courses according to employer and staff needs.</p>	<p>Online / virtual learning could be highly flexible for training around work commitments. Online content could include:</p> <ul style="list-style-type: none"> • live online video tutorials, podcasts and communication with industry experts • virtual reality learning could provide students experience of in-work training and learning, such as acting as a chef in virtual reality. Similar to scenario training. <p>This also allows for social inclusion of disadvantaged students who may</p>

	<ul style="list-style-type: none"> • leadership and management • culinary trends • 21st Century entrepreneurship. <p>The option for a potential bistro café / restaurant onsite at the academy would also allow for students to study and learn, whilst working in a real world environment, that could potentially be open to the public.</p>		want to study in work training however cannot due circumstances.
Curriculum	Course content would be dependent on students current knowledge and experience. The offer could be an overall workplace approach or more specialist subject areas. The potential for ongoing short courses can be delivered by the academy, partners and online. Modules will build up skills and experience portfolio for students, plus added value of real environment experience for CVs.		
Mentoring and Coaching	The aim of mentoring and coaching would be that students would learn from professionals in their field via interactions with mentees.	The blended learning and virtual course gives a unique aspect to mentoring and coaching. There would be a potential for online mentors to provide one-to-one guidance and feedback to course participants. Alternatively, another option would be for the employer to nominate a mentor within the workforce.	
Career Progression	To support career progression, employers could be encouraged to offer promotions or new responsibilities to individuals who complete the course.	Blended and online courses can help enhance current local tourism and hospitality business, this will encourage business growth within the industry with upskilled staff.	
Network	Network opportunities would be available, as student may not be just located at one industry partner establishment. Students therefore, would learn a diverse set of skills from varied professionals / mentors. There is also the potential for created networks amongst students and their peers from group learning.	Blended learning would allow for current business staff, currently learning new skills or experiences, to network with current full-time students.	It is unlikely that a virtual or blended learning academy would establish close personal relationships in the same way a physical space would. Nevertheless, social media and online portals could provide a useful space for attendees to share career advice and experiences.

Sharing Sector Best Practice

6.26 A future academy’s relevance is premised on its ability to demonstrate and share best practice throughout the tourism and hospitality sector. It is, therefore, imperative for the academy to host events, create a network between students, alumni, and businesses, to produce its own content to encourage interactions with industry leaders as well as to recruit participants, and utilise academy ambassadors to create a distinctive brand.

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

	<p>allow training within the academy to be relevant to industry needs.</p> <ul style="list-style-type: none"> • Hospitality 16 has training programme called ‘The Hub’ where recruits gain real life hospitality experiences as part of their training. • This physical space could be used by students for free as part of their provision, but businesses could ‘rent’ spaces in which engagement takes place. 	<ul style="list-style-type: none"> • The academy has the opportunity to develop an online portal that could create a network between current students and those who have undergone a course of training. A portal would allow sector wide and academy news to be shared amongst participants as well as supporting a network of academy alumni. • An online network also has the potential of allowing for engagement and shared learning between alumni and current students by allowing those who have successfully pursued careers within the tourism and hospitality sector to share their experiences.
<p>Content Production</p>	<p>The production of online content is something that could take place within all of the iterations of a future academy. It is important for a future academy to produce its own content that will both encourage interactions with industry leaders as well as to recruit participants.</p> <ul style="list-style-type: none"> • Blogs – The academy could share best practice content and innovative ideas through online blogs. The medium would allow the academy to promote its tourism and hospitality expertise as well as becoming an informative site to engage with other industry leaders. • Social media – Using social networking sites such as Twitter, Instagram, Facebook and YouTube would allow the academy to engage with a wide audience and build a relationship with key stakeholders within the sector. • Videos – Using videos to promote the academy is a useful way to share tacit knowledge within the sector. The academy could use Typsy which is an online platform that allows tourism and hospitality instructors from all over the world to upload short training videos. • Podcasts – Podcasts have become a hugely popular medium to communicate, often complex topics, through story-telling. The academy could use podcasting as a means to discuss a variety of topics that are shaping the tourism and hospitality sector. 	
<p>Academy Ambassadors</p>	<p>Utilising academy ambassadors is something that could take place both physically within a future academy and through some engagement online. academy ambassadors could consist of alumni students who then represent and promote the work of the academy in colleges to encourage admissions and to engage with businesses within the tourism and hospitality sector to share best practice.</p> <p>An ambassador role could include responsibilities to:</p>	<p>Social media influencers could be employed online to present the innovative work of the academy and cement its reputation as a place of world leading training within the sector. They could also promote those who have undergone a course</p>

	<ul style="list-style-type: none">• Be the focal point for alumni, students and prospective students• Actively network to advocate the brand of the academy• Develop business connections to support alumni activities• Provide support for careers related activities	of education with the academy and become successful leaders.
--	---	--

7. Summary and Way Forward

Summary

- 7.1 The WP1 report provided an overview of the tourism industry, and how national and global trends will affect the sector. Importantly, it identified key trends (e.g. sustainability) that Wales is well positioned to deliver upon.
- 7.2 This WP2 report has aimed to build upon these findings and has provided a critical review of product development in the sector, to identify areas of regional growth. Areas relating to eco-tourism, natural assets and outdoor adventures were identified as growth sectors.

Recommendations

- 7.3 A review of existing training provision for tourism and hospitality concluded that there was a shortage of courses delivering specialisms such as outdoor leadership.
- 7.4 Based on these findings, a blueprint for a sustainable tourism academy was developed. It outlined three delivery options: physical space, blended learning, and virtual learning. The suggested courses aimed to address current skills gaps (entrepreneurship, soft skills, innovation, high-level specialisms), provide sustainable employment opportunities (via mentoring and coaching) and address negative perceptions of the industry (encouraging hobbies such as outdoors sports).

Way Forward

- 7.5 The next stage of Academy scoping is to develop a business plan for the academy. Areas to be further explored include:
- Funding options: Welsh Government, third sector, industry and European funding options
 - Partnerships: industry experts, work experience placements,
 - Logistics of delivery: transport, accommodation, seasonality

- Location: county, and access to local assets
- Industry insight: employer, workforce, and existing tourism and hospitality view points
- Facilities: onsite restaurant or café, experimental space, entrepreneurship hubs/start-up incubator space
- Collaboration: networks with existing FE, HE and in-work hospitality and training providers

Annex A List of tourism and hospitality related course by formal education institution and course type

FE Institution
<p>Adult and Community</p> <p>A taste of Asia A taste of France A taste of Italy Baking and Just Desserts Basic Cooking and Beyond Cake Decoration Level 1 - Rhos-on-Sea Cake Decoration Level 2 - Rhos-on-Sea Cake Decoration Level 3 - Rhos-on-Sea Certificate for Tourism Events Assistant - Rhos-on-Sea Cooking for Pleasure Introduction to Sugar Craft Introduction to Wired Sugar Flowers - Rhos-on-Sea Specialist Sugar Craft Techniques Sugar Craft Decorated Cupcakes Train to be a Resort Representative - Rhos-on-Sea Train to be Cabin Crew - Rhos-on-Sea Wired Sugar Flowers - Level 1 - Rhos-on-Sea Wired Sugar Flowers - Level 2 - Rhos-on-Sea</p>
<p>E-learning</p> <p>Level 2 Air Cabin Crew Diploma Level2 Holiday Rep Diploma Travel & Tourism Diploma</p>
<p>FE</p> <p>Advanced Professional Cookery Diploma Bakery - (Cardiff) Bakery FT Level 3 - (Cardiff) BTEC Diploma in Travel and Tourism and Advanced WBQ BTEC Level 1 in Tourism BTEC Level 2 Diploma in Travel and Tourism BTEC Level 2 Extended Certificate in Travel and Tourism BTEC Level 3 Extended Diploma in Travel and Tourism BTEC Level 3 in Travel & Tourism with WBQ Cabin Crew - Introduction, Rhose City & Guild Level 2 Certificate in Air cabin crew - Barry City & Guilds Level 2 Award in Retail Skills - (Cardiff) City & Guilds Level 2 Customer Service for Tourism and Hospitality City & Guilds Level 2 Diploma in Professional Bakery (Patisserie and Confectionery) City & Guilds Level 3 Diploma in Advanced Bakery, Patisserie & Confectionary Skills FDQ Level 2 Bakery Certificate Food and Beverage and Professional Cookery Food and Beverage Service Supervision</p>

Food and Beverage Service Supervision
Full time - Exploring Catering Entry 1 and 2
Fulltime - City Guilds Certificate in Hospitality, Travel and Tourism Level 1
Full-time Agored Cymru Hospitality and Catering Studies Level Entry
Full-time BTEC Travel and Tourism Extended Diploma Level 3
Full-time City Guilds Diploma Advanced Technical in Professional Cookery Level 3
Full-time City Guilds Diploma in Travel and Tourism Level 2
Full-time City Guilds Diploma Professional Cookery Level 1
Full-time City Guilds Diploma Professional Cookery Level 2
Get Started in the Bakery - Produce Basic Pastry Product
Get started in the Restaurant - introduction to Silver service
Get Started in the Restaurant - Introduction to Barista
HND Tourism and Hospitality Management
Hospitality - Introduction - Barry
Hospitality - Introduction (East Cardiff)
Hospitality / Food and Beverage Service
Hospitality and Catering Level 1 - Bangor / Dolgellau / Rhos-on-Sea
Hospitality and Catering Level 2 - Bangor / Dolgellau / Rhos-on-Sea
Hospitality Supervision - NVQ L3 - Barry
Introduction to Catering
Introduction to Professional Cookery
Introduction to Professional Cookery and Food and Beverage Service Level 1 - Bangor /
Dolgellau / Rhos-on-Sea
Introduction to Professional Cookery Diploma
Introduction to the Hospitality Industry L1 Diploma
L2 Hospitality and Tourism
L2 Professional Cookery & Food Service - VRQ - (Cardiff)
L3 Professional Cookery & Food service - VRQ - (Cardiff)
Level 1 Diploma in Food Industry Bakery Skills (FDQ)
Level 1 Diploma in Professional Cookery and Food and Beverage Service
Level 1 in Professional Cookery - Ystrad Mynach
Level 1 in Professional Cookery - Nantgarw
Level 1 in Professional Cookery - Aberdare
Level 1 in Professional Cookery - Rhondda
Level 1 in Travel & Tourism - Ystrad Mynach
Level 2 Diploma in Professional Cookery and Food and Beverage Service
Level 2 Hospitality Services - Aberdare
Level 2 Hospitality Services - Nantgarw
Level 2 Hospitality Services - Rhondda
Level 2 Hospitality Services - Ystrad Mynach
Level 2 in Air Cabin Crew - Ystrad Mynach
Level 2 in Professional Cookery, Level 2 in Professional Food & Drink - Nantgarw
Level 2 in Travel & Tourism - Ystrad Mynach
Level 3 Food Safety in Catering, Retail or Manufacturing (Cardiff)
Level 3 in Professional Cookery/Patisserie/Food & Beverage Service Supervision -
Aberdare

Level 3 in Professional Cookery/Patisserie/Food & Beverage Service Supervision - Nantgarw
 Level 3 in Professional Cookery/Patisserie/Food & Beverage Service Supervision -Ystrad Mynach
 Level 3 in Travel and Tourism with Air Cabin Crew - Ystrad Mynach
 Level 3 in Travel and Tourism with Air Cabin Crew -Ystrad Mynach
 Level 3 Supervision Food and Beverage Service and Diploma in Professional Cookery Preparation
 Level 4 Diploma in Professional Cuisine - Nantgarw
 Personal License Holders - HABC Award (Cardiff)
 Professional Cookery
 Professional Cookery (Kitchen and Larder) Level 3 - Dolgellau / Rhos-on-Sea
 Professional Cookery / Food and Beverage Service
 Professional Cookery / Food and Beverage Service
 Professional Cookery and Food and Beverage Service Level 2 - Dolgellau / Rhos-on-Sea
 Professional Cookery and Food Service L1
 Professional Cookery and Food Service L2
 Professional Cookery Diploma
 Professional Cookery Skills / Food and Beverage Service Skills
 Professional Food and Beverage Service - Supervision Level 2 - Rhos-on-Sea
 Professional Food and Beverage Service - Supervision Level 3 - Rhos-on-Sea
 Professional Patisserie and Confectionery Level 3 - Dolgellau / Rhos-on-Sea
 Travel and Tourism
 Travel and Tourism - (1-year 90 credit diploma) - Barry
 Travel and Tourism - (1-year 90 credit diploma) - Cardiff
 Travel and Tourism - Barry
 Travel and Tourism Extended Diploma L3
 Travel and Tourism L1
 Travel and Tourism L2
 Travel and Tourism L3
 Travel and Tourism Level 2 - Rhos-on-Sea
 Travel and Tourism Level 3 - Bangor / Rhos-on-Sea
 Travel and Tourism Levels 1 & 2
 Vocational Studies Hospitality
 VRQ Hospitality - (Cardiff)
 Working in the Travel Industry

HE

BA (Hons) Culinary Arts - Rhos-on-Sea
 BA (Hons) Hospitality Management - Rhos-on-Sea
 BA (Hons) Management of Travel and Tourism - Rhos-on-Sea
 Foundation Degree (FdA) Culinary Arts - Rhos-on-Sea
 Foundation Degree (FdA) Tourism Management - Rhos-on-Sea
 Foundation Degree (FdA) Hospitality Management - Rhos-on-Sea
 HNC in International Tourism and Event Management (University of Wales Trinity St David)
 Hospitality Management & the Culinary Arts – HNC
 International Tourism and Events Management - BA (Hons) Top up Degree

Short course / Training
<p>Excellent Customer Service Skills - Abergele / Dolgellau / Llangefni Highfield Level 2 Award in Food Allergen Awareness and Control in Catering - Abergele / Dolgellau Highfield Level 2 Award in Food Safety (Refresher) in Catering, Manufacturing or Retail - Abergele / Rhos-on-sea Highfield Level 2 Award in Healthy Food and Special Diets - Abergele / Dolgellau Leisure Activities for Hotels and Tourism Outlets</p>
HE Institution
HE
<p>Adventure tourism Management (BSc, 3 years) BA (Hons) Event Management - 3 years or 4 years Sandwich BA (Hons) Event Management (Including Foundation Year) - 4 years BA (Hons) Hotel and Hospitality Management - 3 years BA International Hotel Management, 2 years BA International Travel and Tourism Management, 3/4 years with sandwich BA Leisure Management - 3 /4 years with sandwich placement BA Tourism Management 3/4 years with sandwich placement Foundation Degree Tourism Management - 2 years HND Events Management - 2 years HND Tourism Management - 2 years Hospitality Management - BA (Hons) Hospitality, Tourism and Event Management - BA (Hons) 3 years Hospitality, Tourism and Event Management - BA (Hons) 4 years International Hospitality & Events Management - BA (Hons) International Hospitality & Tourism Management - BA (Hons) International Tourism & Events Management - BA (Hons) International Tourism Management - BA (Hons) Joint Honours - Tourism Management / Marketing (BSc, 3 years) M(Tour) Tourism Management - 4 years Tourism Management - BA (Hons) Tourism Management (BSc, 3 year) Tourism Management with French (BSc, 4 year) Tourism Management with Spanish (BSc, 4 year)</p>