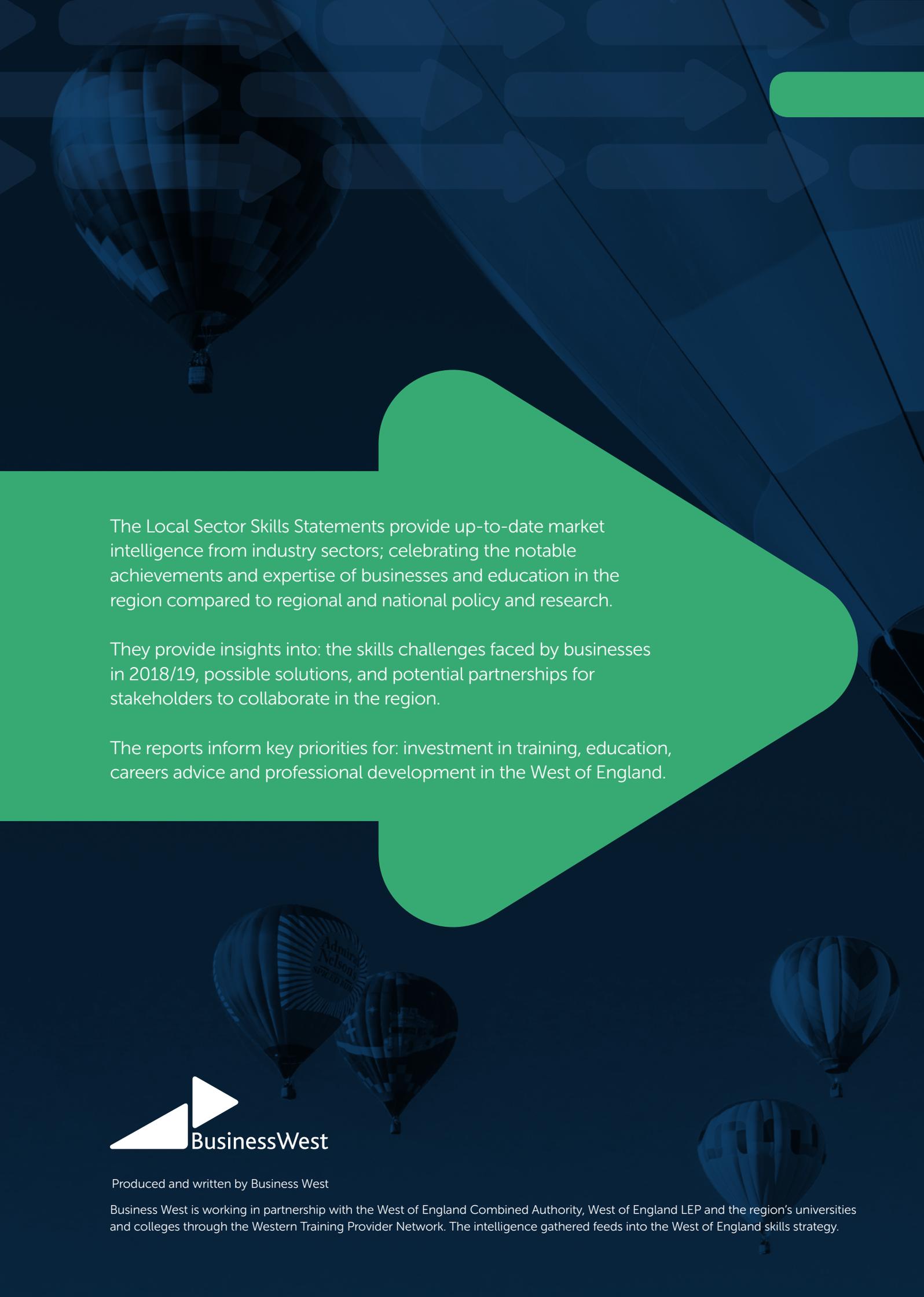


Visitor Economy

West of England Local Sector
Skills Statement 2019



Working together to develop the current
and future skills of the sector.



The Local Sector Skills Statements provide up-to-date market intelligence from industry sectors; celebrating the notable achievements and expertise of businesses and education in the region compared to regional and national policy and research.

They provide insights into: the skills challenges faced by businesses in 2018/19, possible solutions, and potential partnerships for stakeholders to collaborate in the region.

The reports inform key priorities for: investment in training, education, careers advice and professional development in the West of England.



Produced and written by Business West

Business West is working in partnership with the West of England Combined Authority, West of England LEP and the region's universities and colleges through the Western Training Provider Network. The intelligence gathered feeds into the West of England skills strategy.

Visitor Economy

Local Sector Skills Statement 2019

The hospitality industry is the third biggest employer in the UK, accounting for 3.2m jobs through direct employment in 2017, and a further 2.8m indirectly. The industry generated over £72bn of Gross Value Added directly to the UK economy, and a further £86bn indirectly. ⁽¹⁾

The UK is forecast to have a tourism industry worth over £257 billion by 2025. ⁽²⁾ The hospitality sector employs 3.2 million people in the UK accounting for 10% of total employment. It produces £130 billion in economic activity and has been the best performing industry in terms of labour productivity since 2009. ⁽³⁾

As of 2017, there were 61,055 jobs within the sector in the West of England and a 4.7% increase is anticipated by 2026. ⁽³⁾

The visitor economy sector in the West of England is broad. It incorporates all the elements that make for a successful visitor destination for business and pleasure: the attractions and venues that interest visitors; the infrastructure that helps to make them accessible; and services that cater for the needs of visitors (and residents) – all creating economic and social activity. This breadth and depth means that career opportunities with rapid progression routes are vast for those with a passion for service delivery. In addition to this, sport, health and leisure time is becoming increasingly valuable and ensuring visitors are well catered for is a big responsibility. The West of England region is home to employers: Bristol Airport, First Group, and GWR, along with a vast array of companies within the hospitality and visitor industry, including many major brand hotels, museums, theatres and performance venues, music and leisure venues and sites of significant cultural value.

Equally the industry has a large proportion of independent micro and artisan businesses, many of whom help define and enhance the uniqueness of the region.

The hotel and conference presence, as well as the excellent transport connections, are considered attractive to businesses. It is predicted that those visiting will look more at extended stays and incorporate leisure activities. There has been exceptional growth in hotels and restaurants and a number of new hotels are expected to be built. Whilst this shows the region is still attractive, it doesn't necessarily result in job creation and with continued efforts to attract trade and investment opportunities, customer expectations on service will only increase.

Technology has a part to play within the visitor economy. SMEs particularly are now competing on a global scale and digital reach is becoming more important. Businesses will need to assess whether they have adequate technical and digital skills to manage cyber security, data protection and ensure that they are building and marketing products effectively. Tech savvy tourists now demand more when they travel, using leading review and comparison websites to find the best deals on hotels and travel as well as seeking recommendations from social media. Visitors want to fully immerse themselves in experiences – from apps that provide on demand information, to connected tech at hotels or immersive VR/AR experiences that bring cultural sites and attractions to digital life. In 2018, the West of England Combined Authority secured £5 million from government to trial a superfast 5G network at tourist destinations in the region. This testbed will focus on delivering enhanced visual experiences for tourists using Augmented Reality (AR) and Virtual Reality (VR) technology at major attractions including the Roman Baths and Millennium Square.

The sector continues to experience skills shortages, particularly for chefs and management. It is widely documented that the industry will be one of the hardest hit by Brexit as it is the second largest employer of EU workers by number ⁽³⁾. To this end, employers and education providers in the region must work together to develop world class skills and training opportunities that will help to position the sector correctly and demonstrate that it can be a prestigious and rewarding career path.

To further address the importance of the sector and its economic contribution, leaders from the tourism industry across the UK, including the West of England, have been working collaboratively to produce a bid for an ambitious Sector Deal in the UK government's Modern Industrial Strategy. Such a deal would see the implementation of a 10-year growth plan focussed on boosting productivity, introduction of Tourism Zones and improved connectivity (infrastructure). The deal would include a major skills campaign designed to improve the perception of tourism and hospitality jobs, encouraging more people to join the industry. It will also look to include tourism and hospitality in the government's new T-Levels (Technical Levels), apprenticeship standards and to support many more industry and employer ambassadors into schools and colleges to promote the industry.

"Given the importance of the visitor economy to the West of England, we must invest in the promotion and marketing of the sector in terms of increased technology, better infrastructure, education and longer-term skills support in order to provide a world class sector that can be an exemplar of good practice both nationally and internationally. We are keen to work together with partners across the region, including Destination Bristol and West of England Combined Authority to ensure that our current funding challenges are easily overcome by a universal spirit of partnership working across the region."

Leslie Redwood, Visit Bath

Key Facts

A summary of key facts both locally and nationally in this sector

In 2018, Association of Licensed Multiple Retailers (ALMR) and British Hospitality Association (BHA) merged to create **UKHospitality** – a united voice representing the hospitality industry.



Hospitality is the third largest private sector employer representing **10% of UK employment**.⁽³⁾



In 2016 – 2017 **25,000 people** joined the hospitality industry via the **apprenticeship pathway**.⁽³⁾



In the West of England during 2017 **61,378 job vacancies** were advertised. The average wage was £16,787.⁽⁴⁾



In the West of England employers in the visitor economy sector responding to the Business West Skills and Training Survey 2018 stated that the **top 5 most important skills** to their business are:



18% of businesses responding to the Business West Skills and Training Survey 2018 reported **hard to fill vacancies** in the last 12 months, of those, 13.6% were semi/unskilled roles.⁽⁵⁾



50% of advertised vacancies required GCSE standard grades or level 2 NVQs.⁽⁴⁾



63% of survey respondents in the West of England **have never used apprenticeships** to recruit new staff or upskill their existing workforce.⁽⁵⁾



35% of businesses in the visitor economy sector currently engage with **schools, colleges or other education providers**.⁽⁵⁾

Top 3 activities include:

28.6%
Short work placements

14.3%
Work place visits

11.4%
Careers fairs advice/talks

During 2018 the city of Bath saw the opening of **three new hotels and one restaurant, a purpose-built conferencing facility and a casino**. The city saw an increase in employment within accommodation and food services from **8,000 to 9,000 people**.⁽⁷⁾



Notable Achievements

Local Sector Skills Achievements in 2018

Since the start of the **Skills West programme at Business West**, a total of **153 employability opportunities** have been pledged from the visitor economy sector across the West of England. Opportunities include offers of work experience, apprenticeships, workplace visits, mock interviews and CV advice sessions.

The **West of England Combined Authority** secured £5 million from government to trial a superfast 5G network at tourist destinations in Bristol and Bath to improve visitor experience. The first major trial went ahead in December 2018 which involved guests using a smartphone app to download and view virtual reality (VR) and augmented reality (AR) content at three locations around the Roman Baths. Visitors were able to try out futuristic technology which immersed them in the site's rich history.

Since launching in April 2018, **The School of Food**, a new chef apprenticeship programme managed by **Weston College** has recruited three separate groups of commis chef students studying across two training locations, Weston College's training kitchen, The Grove in Weston and Ashton Gate Stadium in Bristol. A successful school engagement programme is in place working with a number of partners, and The School of Food is engaging with offenders highlighting careers in hospitality, part of Weston College's Offender Learning programme. The School of Food was also 'highly commended' at this year's Crumbs Awards for best initiative: 'The School of Food is revolutionising the way young talent is brought into the industry. Its offering is exciting and innovative'.

Bristol and Bath tourism through the **Bristol and Bath Cultural Destinations Project** received an additional £150,000 funding which will extend the project into South Gloucestershire and North Somerset over two years from January 2018 – December 2019. The collective partnership brings together the West of England's cultural and tourism sectors to increase the size and value of the visitor economy.

Bristol & Bath Cultural Destinations launched a new website to support their collaborations. **Gobathbristol.com** features leading arts, cultural and heritage organisations across the whole West of England region, highlighting the diverse offer to encourage more national and international visitors.

In November 2018, UK government agreed to enter into negotiations with leaders from the UK visitor economy sector regarding a deal linked to the industrial strategy. Part of the deal includes a major **UK wide skills campaign** designed to improve perception of tourism and hospitality jobs. Regional representatives are part of these discussions. ⁽⁶⁾

During 2018 the city of Bath saw the opening of a new **Z-Hotel, The Country Living Hotel, The Ivy Brasserie**, a casino and a purpose built conferencing facility as part of The Apex Hotel.

Bristol has achieved several accolades during 2018 which include Customer Service Superstar Award (Jenny Stoves, Bristol Zoo), Visitor Information Centre of the year (Visit Bristol), Outstanding contribution to Tourism (Kathryn Davies, Destination Bristol)*. Bristol also won Rising Star destination from National Geographic Traveller Magazine – beating off international competition!

In the first eight months of 2018, **Bristol Airport** recruited nearly 100 new team members, taking the number employed directly by the company to approximately 375, with a total of around 3,500 working for 50 organisations across the site.

Skills Priorities for 2019

Priority One

Improve Careers Education Information Advice and Guidance (CEIAG)

- *Reflecting on how the objectives in this section can address equality and diversity.*



Issues

The industry suffers from poor perception. In the Business West Skills and Training Survey 2018 the majority of businesses stated that low wages and competition from other sectors remain a big concern and 22% felt that progression routes were unclear. Survey responses also suggested that 22% of businesses recruited 16-18 year olds not in training.⁽⁷⁾ Whilst this is still relatively low, it has increased from 8.7% last year. The sector can provide opportunities for those not in education, employment or training, who need work experience in a job where they can see opportunities to advance. The sector can also look to put those 16-18 year olds into an apprenticeship which is at little cost.

Objectives

- ▶ Education providers and Business West to encourage more businesses to offer opportunities for people to try new experiences of working in the visitor economy and share best practice
- ▶ Local employers and education providers to promote visitor economy as an attractive career option to people of all ages and the variety of new progression routes and career options
- ▶ Industry to provide up-to-date labour market information to local schools (from primary level), colleges and universities to include the range of opportunities available in the sector. (e.g. Pathways to Professions, Springboard)
- ▶ Education providers and Business West to encourage and support employer engagement in activities that promote the sector and the support available from industry associations. Engaging with local CEIAG strategies and programmes including the objectives of the Careers Enterprise Company and Careers Hub to ensure careers advice and routes into the sector are clear and current
- ▶ Education providers and Business West to help businesses develop pre-employment training that addresses the challenges affecting the sector

Local Response

The West of England Careers Hub was launched in September to work with 25 schools and colleges across the region to improve careers and work experience opportunities for young people. The hub will offer targeted support to schools including up to £3,500 per year to use on opportunities to strengthen links with employers; access to a Hub Network Group, which will build a community of good practice between schools; support from an Enterprise Co-ordinator and Enterprise Advisors; Careers Leader Training; and Continuing Professional Development for wider teaching staff.

The School of Food (Weston College) has engaged with prisons across the South West to offer taster days and inspire learners to join the industry. With links secured with employers already, over 50 learners have been inspired to continue their learning post release. In June 2018, a collaboration between Weston College and the Chef's Forum Academy also saw over 400 GCSE students take part in a hospitality industry day which showcased the vast and rewarding careers available within the industry. Taster training sessions are delivered to school students in Bristol and Weston-

super-Mare, and the School is a key part of South Bristol Youth's aspiring apprentices' programme that delivers careers advice and awareness experiences to secondary school students in Bristol.

In September 2018, Skills West launched the 'Find Your New Recruit' campaign to raise awareness of the skills gap affecting employers across the West of England and encourage pledges of time and knowledge from industry to help build the talent pipeline. 30 LEGO® figures of various professions, including a chef, were hidden at iconic locations across Bristol. Once found, finders were encouraged to take a selfie with their 'new recruit' at their place of work and tweet with the hashtag #pledgeyoursupport.

In October 2018, SGS College and City of Bristol College delivered the Bristol Ambitions event, which featured the hospitality, catering, tourism and leisure sectors amongst others. The event had 120 exhibitors and welcomed over 4000 students from schools.

Future Recommendations

The visitor economy sector to support the objectives of the Careers Enterprise Company in the West of England as part of the Enterprise Adviser Network and Careers Hub. Also to partner with other CEIAG agencies and initiatives to engage with schools, FE Colleges and Higher Education to promote the sector.

Skills Priorities for 2019

Priority Two

Improve the quality and responsiveness of local education and training provision



Issues

In the Business West Skills and Training Survey 2018, the top 3 most important skills were stated as; communication, team working and customer service. Many employers also feel skills gaps exist or will develop in the next 12 months in practical areas such as; food/customer service, food safety, and that ESOL should remain a priority ahead of Britain leaving the EU.

Currently 45.7% of employers use an in-house trainer and lack of budget for training is the biggest barrier for 14.3%.

Provision must reflect the highest standards to ensure the sector survives upon exit from the EU and can match the service levels provided currently by migrant workers. The chef shortage continues to be a national concern.

Objectives

- ▶ Encourage businesses to work with education and skills providers to become involved with the co-design of training provision that is relevant to industry needs and addresses the challenges affecting the sector
- ▶ In order to achieve 'world class skills' development and prestige positioning, employers and education should consider comparing provision against that available within Europe and learn from best practice
- ▶ Ensure that relevant labour market intelligence is fed back continuously to education to ensure issues and actions remain focused in curriculum delivery

Local Response

Since launching in April 2018, The School of Food, a new chef apprenticeship programme managed by Weston College has recruited three separate groups of commis chef students studying across two training locations: Weston College's training kitchen, The Grove in Weston and Ashton Gate Stadium in Bristol. Working in partnership with Josh Eggleton, Chef Patron at the Pony & Trap and St Monica Trust, The School of Food delivers an exciting masterclass programme for aspiring chefs, with a key focus on employers delivering masterclass training, providing high-quality chef training from those in the industry.

In 2018, national provider HIT Training announced the launch

of the HIT Hospitality Academy. Designed to sit alongside the Hospitality Team Member apprenticeship, the programme offers additional workshops to enrich their knowledge in customer services excellence, servicing wine, beer and cellar quality, spirits cocktails and mixology and barista skills.

During the lifetime of the Skills West programme three sets of Local Sector Skills Statements and Provider Action Planning analysis have been produced for each industry sector, including visitor economy, offering up to date insight and data analysis within the region to support education with curriculum development.

Future Recommendations

Ensure local businesses, education providers and stakeholders work together to ensure continued co-design of curriculum.

Skills Priorities for 2019

Priority Three

Increase apprenticeship starts and availability of higher apprenticeships

- Reflecting on how the objectives in this section can address diversity and equality.



Issues

Whilst perception of the apprenticeship levy has improved, there is still a lack of understanding around recent reforms and the benefits, particularly amongst SMEs; 63% of businesses responding to the Business West Skills and Training Survey 2018 have never used apprenticeships to recruit or upskill staff, with the presumption that they are not available within the sector being the main deterrent.⁽⁷⁾ Additionally, many tourism businesses report a difficulty in attracting and retaining apprentices due to the seasonal nature of their business or feel that they are not appropriate for this reason.

Objectives

- ▶ Ensure that businesses have a clear understanding of the apprenticeship reforms, new standards, the Levy and that opportunities are communicated and accessible
- ▶ Promote apprenticeships not only as an entry route into the sector but as a pathway for career progression and up-skilling for existing employees
- ▶ Employers and education providers must work together to develop a range of apprenticeships and entry routes that can meet the needs of businesses, enable career progression and contribute towards a sustainable workforce
- ▶ Encourage businesses to engage with the South West Apprenticeship Ambassador Network and encourage apprentices to become young ambassadors

Local Response

Since launching in April 2018, The School of Food, a new chef apprenticeship programme managed by Weston College has recruited three separate groups of commis chef students studying across two training locations. There are currently 25 students working with employers across the region.

Skills West as part of Business West has continued to work with

employers to offer free advice and guidance on apprenticeships through face to face engagement and skills clinics.

South West Apprenticeship Ambassador Network is building a strong cohort of business ambassadors and encouraging apprentices to become young ambassadors.

Future Recommendations

Ensure local businesses, education providers and stakeholders continue to work together to ensure ongoing introduction of apprenticeships into business of the right quality and level.

Skills Priorities for 2019

Priority Four

Engage SMEs in the active retention of staff through programmes of skills development and training to ensure increased productivity and sustainable growth

- *Encouraging SMEs to consider best practice in staff welfare.*



Issues

The sector as a whole experiences a high turnover of staff and, with low unemployment levels in the West of England, consideration should be given to retention and training the existing workforce. National forecasts show that the number of talented leaders capable of managing teams and boosting performance will increase in the coming years. In the Business West Skills and Training Survey 2018, only 11% of businesses had used apprenticeships to upskill their employees.

Objectives

- ▶ Business West to continue to work with partners, education and employers to collate intelligence and inform industry of skills demands and emerging needs
- ▶ Through Skills West and other business engagement programmes promote awareness of the use of apprenticeships to upskill the existing workforce and aid retention; particularly, around key skills needs in leadership and management and customer service
- ▶ Develop and deliver a series of information-based workshops that address knowledge gaps around upskilling and staff development
- ▶ Future Bright, Business West and other regional business engagement programmes to ensure businesses are informed of the support for in-work training and apprenticeships to upskill their existing workforce and support in-work progression for all employees. Ensure best practice and learning is shared between businesses

Local Response

Skills West teamed up with experts Atoll HR, to deliver interactive workshops for SMEs focussing on the importance and benefits of talent management and succession planning. Attendees gained knowledge, insight and basic tools to help improve their people planning processes, employee engagement and retention to aid growth and productivity.

South West Apprenticeship Company worked with Skills West to deliver a series of advice and guidance sessions to SMEs.

The sessions aimed to demystify apprenticeships and explored how they can be used to recruit new staff and upskill the existing workforce, funding, common myths and where to go for support.

The vast majority of employers that employ School of Food apprentices are SMEs, with many utilising the programme to up-skill existing employees to encourage retention, develop skills and grow their own talent due to the challenges of recruiting head chefs in the region. This has included SME business owners.

Future Recommendations

Ensure businesses are informed of the support for in-work training and apprenticeships to upskill their existing workforce and support in-work progression for all employees. Ensure best practice and learning is shared between businesses.

Skills Priorities for 2019

Priority Five

Support SMEs to be inclusive and effective in staff recruitment

- Reflecting on how the objectives in this section can address equality and diversity.
- How to build the talent pipeline in the region.



Issues

Given the reliance on EU workers, any restrictions on recruiting EU nationals will have an impact as a result of Brexit. The sector needs to ensure it is building a sufficient pipeline of talent and inspiring people to work in the sector. 71% of businesses surveyed as part of the Business West Skills and Training Survey 2018 do not currently have an Equality & Diversity policy.⁽⁷⁾ As the region has a growing BAME and ageing population it is a commercial imperative that businesses look more closely at their recruitment practices to ensure that all customer needs are met.

Objectives

- ▶ Encourage recruitment and promote the sector via sustainable but flexible labour pools, such as older workers and female returners, who may already have general business skills increasing competency and retention of the workforce
- ▶ Encourage more businesses to take advantage of the benefits of apprenticeships at all levels in order to future-proof the workforce
- ▶ Help to identify opportunities for pre-employment programmes and work with partners to support people into employment where appropriate
- ▶ Support the work of industry bodies and regional programmes such as Future Bright to create employment and work experience opportunities for those from all backgrounds
- ▶ Support the work of national industry bodies and other organisations to create a variety of employment and work experience opportunities for those from all backgrounds
- ▶ Business West through the Skills West programme to encourage companies to seek best practice to explore their company culture and the nature of their 'talent pipeline' to open up recruitment possibilities for under-represented groups

Local Response

Square Food and Bristol24/7 as part of the Better Bristol project launched 'How to be a Chef' 12 week programme. Headquartered in Knowle West, the programme provides young people aged 16+ with employability skills and opportunities for further catering related learning or employment.

Weston College has developed links at many prisons to local and regional catering employers to offer work opportunities on release. The college currently offers a range of City & Guilds Professional Cookery and Hospitality courses in the South West prisons, at Level One and Two, including NVQ Diplomas at Level Two. It also delivers a Food Safety Award helping to make learners employment ready. In addition, The School of Food has focused on ensuring that a diverse range of apprentices join the programme, with over 50% of the Weston based students who joined in October being female.

In 2018, The Springboard Charity and Springboard UK, launched the Kickstart Into Work Programme across Bristol and Bath. With support from employers in the region, the programme provides individuals with employability skills and training in Health and Safety, Food Hygiene and World Host.

The Skills West team, supported by Flexology delivered a workshop focussing on flexible working. During the workshop, attendees learned about the benefits of a diverse talent pool and how to appeal to groups through better job descriptions. Signposting to diverse groups within the region was also provided to encourage employer collaboration and engagement opportunities.

Future Recommendations

Partners to continue working collaboratively to support businesses to be more inclusive in staff recruitment and recruitment practices.

Regional Centres of Excellence and Research

Destination Bristol

Key Training Providers

Bath College
Babcock
City of Bristol College
Weston College – School of Food
SGS College
N-Gaged Training
HIT Training
Lifetime Training
Interserve

Professional Networks and Organisations

Academy of Food and Wine Service (AFWS)
Bristol Hoteliers Association
British Institute of Inn keeping (BII)
British Beer and Pub Association (BBPA)
Craft Guild of Chefs
Destination Bristol
Institute of Hospitality (IOH)
Royal Academy of Culinary Arts
SW Tourism Alliance
Springboard UK
The Chef's Forum
The Institute of Travel & Tourism
Tourism Society
UK Hospitality
Visit Bath

Endorsed by

West of England LEP & West of England Combined Authority
John Hirst, Chief Executive, Destination Bristol

Reference Documents

- 1) The Economic Contribution of the UK Hospitality Industry 2018
- 2) Visit Britain website
- 3) UK Hospitality Workforce Commission 2030
- 4) Emsi - economic modelling 2018 courtesy of Prospects Services
- 5) Business West Skills and Training Survey 2018
- 6) Tourism Sector Deal (proposed) – Visitor Economy
- 7) ONS data 2016/17
- 8) Working Futures 2014 – 2024 – UKCES
- 9) McKinsey Global Institute report, Jobs lost, jobs gained: Workforce transitions in a time of automation
- 10) Industrial Strategy – Building a Britain fit for the Future. Nov 2017

Supporting Research Documents

- a) West of England Combined Authority Business Plan, 2018/19
- b) West of England Combined Authority Operating Framework 2018/19
- c) Industrial Strategy: building a Britain fit for the future, November 2017
- d) The Grand Challenges, Policy paper, May 2018
<https://www.gov.uk/government/publications/industrial-strategy-the-grand-challenges/industrial-strategy-the-grand-challenges>
- e) Careers strategy: making the most of everyone's skills and talents, December 2017
- f) Careers guidance: for further education colleges and sixth-form colleges, February 2018

Get in touch today

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Advise, connect, support



The West of England Combined Authority (WECA) covers Bath & North East Somerset, Bristol and South Gloucestershire. WECA also supports the Local Enterprise Partnership, which includes North Somerset.