

Visitor Economy
West of England Local Sector
Skills Statement 2017



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

Visitor Economy Local Sector Overview

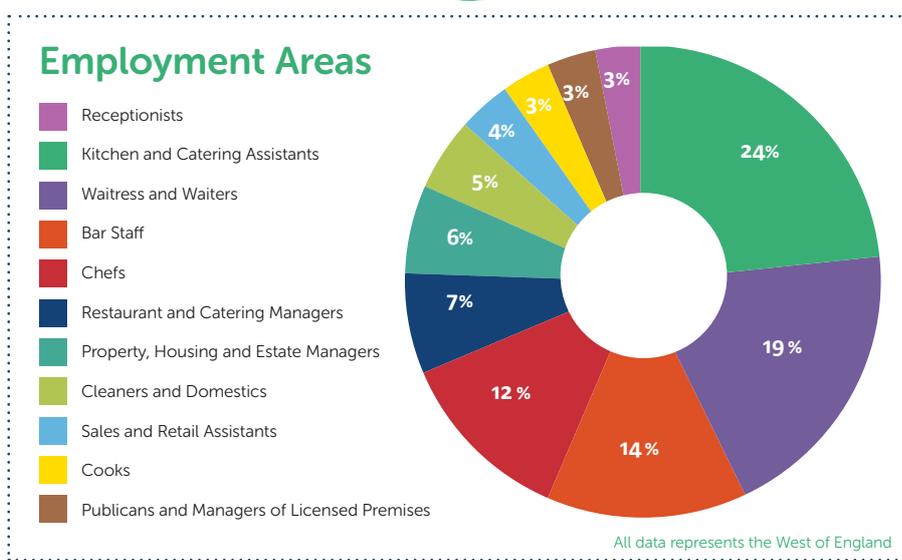
The visitor economy sector is vibrant and significant across the UK. The sector contributes £106bn to the UK economy and is predicted to be one of the fastest growing sectors over the next 10 years⁽¹⁾. In 2015, the total visitor spend in the West of England exceeded £2.13bn, with Bristol and South Gloucestershire alone bringing in £1.33bn.

More than 3 million people are employed within the sector across the UK, accounting for 9.5% of total employment⁽²⁾. As of 2017, there are 61,055 jobs within the sector in the West of England and a 10.9% increase is anticipated by 2024⁽³⁾.

The visitor economy sector is broad. It incorporates all the elements that make for a successful visitor destination for business and pleasure; the things that attract visitors, the infrastructure that helps to make it accessible, or services that cater for the needs of visitors (and residents) that create economic and social activity. This breadth and depth means career opportunities with rapid progression routes are vast for those with a passion for service delivery. Furthermore, leisure time is becoming increasingly valuable to people living in the hectic, modern world and ensuring guests are well catered for is a big responsibility.

The West of England region is home to many major employers - Bristol Airport, First Group, GWR, along with the vast number of varied companies within the hospitality industry, including many major brand hotels. Equally the industry has a large proportion of independent micro businesses and owner/operators, many of whom help define and enhance the uniqueness of the region.

The hotel and conference scene and excellent transport connections is considered attractive to business. It is predicted that those visiting on business will look more at extended stays and incorporate leisure activities. There has been exceptional growth in hotels and restaurants and the region expects to see a number of new hotels between now



and 2020. 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.

The internet has changed the way in which most businesses operate, with many having some form of online presence, which offers a new route to market and way of attracting visitors but this also brings new challenges⁽⁴⁾. Businesses will need to assess whether they have adequate technical skills to manage cyber security and comply with data protection. Equally, social media is fast becoming a preferred tool to promote, recommend and communicate and, as such, businesses will need to ensure they are responsive. It is anticipated that there will be significant demand for management and customer service skills across the sector in coming years; an

estimated 66,000 more managers will be required by 2020 nationally⁽⁵⁾. To this end and with recruitment becoming more difficult due to falling unemployment, businesses must equip their workforce with the right level of skills to exceed demand and ensure that pathways for progression are clear.

The sector still experiences a major chef shortage and there is an over reliance on migrant workers. The visitor economy is the third largest industry employing migrant workers, with 8% of all migrant workers in the UK working in hospitality roles⁽⁶⁾. The threat of a much wider skills shortage looms following the vote to leave the EU; diversifying talent pools and creating clear and visible pathways and equipping young people with the right customer service skills will be essential if the sector is to continue to thrive.

Annual Local Sector Skills Statements report on local sector knowledge and expertise, plus wider regional and national intelligence. Gain insight about skills challenges in your sector, notable achievements and skills priorities and objectives for 2017. The themes have been defined by the West of England Local Enterprise Partnership (LEP) This report has been designed for education providers and businesses to inform decisions and identify objectives for investment in training and development of curriculums.

Key Facts

THE VISITOR ECONOMY SECTOR IS THE **UK'S THIRD LARGEST EMPLOYER, ACCOUNTING FOR 9.5% OF TOTAL EMPLOYMENT** IN THE UK⁽²⁾.



THERE ARE CURRENTLY **30,890 HIGHER EDUCATION STUDENTS** STUDYING COURSES RELATED TO VISITOR ECONOMY IN THE WEST OF ENGLAND⁽⁷⁾.



THE AVERAGE ANNUAL SALARY IN THE VISITOR ECONOMY SECTOR IS **£19,970**⁽⁷⁾.



THE WEST OF ENGLAND LEP EMPLOYER SKILLS SURVEY (2016) HIGHLIGHTS THAT **61% OF BUSINESSES** IN THE VISITOR ECONOMY SECTOR **RANKED LEADERSHIP AND MANAGEMENT AS BEING MOST IMPORTANT TO BUSINESS GROWTH** IN THE FUTURE.⁽⁷⁾



WESTON COLLEGE, CITY OF BRISTOL COLLEGE AND BATH COLLEGE HAVE ALL ADDED COMMERCIAL RESTAURANTS TO THEIR FACILITIES TO **PROVIDE STUDENTS WITH REAL HOSPITALITY INDUSTRY EXPERIENCE.**



THE WEST OF ENGLAND ANTICIPATES **1400 NEW BED SPACES ACROSS THE REGION** BY THE END OF 2019.



BATH IS A 30-YEAR-OLD WORLD HERITAGE SITE AND HAS THE **ONLY THERMAL SPA WATERS FACILITY** IN THE COUNTRY.

BRISTOL AIRPORT IS THE FIFTH LARGEST AIRPORT LARGEST IN THE UK OUTSIDE OF LONDON AND IS STILL EXPANDING. TO COPE WITH DEMAND, IT ANTICIPATES 10,500+ JOBS WILL BE CREATED BY 2037 IN BRISTOL & NORTH SOMERSET. IT WAS ALSO **THE FIRST UK AIRPORT TO ATTAIN WORLDHOST CUSTOMER SERVICE ACCREDITATION.**



THE **TOP 3** HIGHEST EMPLOYED VISITOR ECONOMY AREAS WITHIN THE WEST OF ENGLAND ARE **TAKEAWAY FOOD SHOPS AND MOBILE FOOD STANDS (25%),** EVENT CATERING ACTIVITIES (13%) AND HOTELS AND SIMILAR ACCOMMODATION (9%)⁽⁷⁾.



THE MAIN REASON FOR HARD TO FILL VACANCIES IS FINDING CANDIDATES WITH THE RIGHT LEVEL SKILLS. SOME OF THOSE SKILLS INCLUDE GENERAL BUSINESS SKILLS, **CUSTOMER HANDLING,** TEAMWORKING, COMMUNICATION AND PROBLEM SOLVING⁽⁷⁾.

Notable Local Sector Achievements



The first **Bristol Airport hotel from Hampton by Hilton** opened its doors in February 2017 offering travellers access to convenient accommodation on the doorstep.



In 2016 the **Bristol Hoteliers Forum** was relaunched to protect and promote the interest of hotels in the city. One of the objectives will be to support and promote industry relevant apprenticeships.

The £45m **Dolpin Square retail and leisure complex** is due to be completed in late 2017. The facility includes a variety of branded restaurants, a cinema complex and a health and fitness centre. The development of the site is expected to act as a catalyst to stimulate retail growth in Weston-super-Mare, as well as creating over 200 new job opportunities for local people in the town centre.



The **Roman Baths & Pump Room** building recorded another record breaking year in 2016, making it one of the most visited attractions in the UK, outside of London. Visitor numbers increased by 40,000 to 1,216,938 in 2016. It means The Roman Baths & Pump Room was the second most popular tourist attraction in the South West last year, after Stonehenge.



Aerospace Bristol has opened as the region's largest new attraction with a combined cultural and heritage experience. It tells the story of Bristol's aviation evolution with Concorde Alpha Foxtrot being the centre point in its own hangar, with conference and business event

Leading industry employers have contributed to the design of **18 new apprenticeship standards** ensuring that apprenticeships are fit for purpose and add value to business.

Baylis Estates

Plans have been approved for a new flagship development adjacent to The Venue Leisure Park and The **Mall at Cribbs Causeway**. It will include an international size indoor ice rink and is set to create 240 new jobs.

In 2017, **Bristol topped the list of best places to live in Britain.**

Bath & North East Somerset Council

The West of England-wide Cultural Destinations Consortium, supported by the LEP and Local Authorities, are taking coordinated action to address training, development and skills for the visitor economy including creating coordinated career routes for apprentices and interns, and implementing the WorldHost customer service programme.

Skills Priorities 2017

1. Improve Careers Education Information Advice and Guidance (CEIAG)



Issue:

Young people and those advising them in education do not understand the breadth, depth or accessibility of career opportunities across the visitor economy sector. The image of the sector needs improving to attract new talent into the industry. Springboard currently have 839 ambassadors nationally, with 78 in the West of England alone to promote the visitor economy sector in schools and communities. The sector can provide opportunities for those not in education, employment or training who need workplace experience in a job which they can see offers opportunities to advance.

Objectives:

- Increase the opportunities for people to try new experiences of working in the visitor economy sector.
- Look to larger businesses already offering opportunities and encourage sharing of best practice.
- Ensure that smaller businesses can engage with simplified models of best practice.
- Provide up-to-date labour market information to local schools (from primary level), colleges and universities to include the range of opportunities, where they exist and employer's offers.
- Careers information should provide consistent information about entry routes available at all levels and promote the benefits of rapid career progression.
- Support the objectives of the Careers Enterprise Company in the West of England and encourage employers from within the visitor economy sector to engage with schools as part of the Enterprise Adviser Network.
- Support and encourage employers to engage with the Pathways to Professions programme to ensure careers advice is current and routes into the sector are clear and help individuals to access pre-employment training that addresses the challenges affecting the sector.

2. Improve the quality and local responsiveness of education and training



Issue:

The West of England Employer Skills Survey (2016) highlighted that the main reason for hard to fill vacancies was finding candidates with the right level of skills. Additionally, with increasing levels of expectation, the workforce will need to become more customer focused. Continued collaboration with education providers will be required to develop talented leaders and ensure that the workforce is equipped with the right business and customer service skills.

Objectives:

- Encourage business 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.
- Ensure that labour market intelligence is fed back continuously to education to ensure actions remain focused.

3. Increase apprenticeship starts and availability of higher apprenticeships



Issue:

There is still a lack of understanding around recent apprenticeship reforms, the benefits of apprenticeships and how to develop an existing workforce via this route. According to the West of England LEP Employer Skills Survey (2016), 63% of tourism businesses don't plan to recruit an apprentice in the next 12 months and 76% of business don't plan to up-skill via apprenticeship in 12 months.

Objectives:

- Ensure that businesses have a clear understanding of the apprenticeship reforms, 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 to existing employees and a viable alternative to university.
- Focus should be given to the customer service and leadership and management subjects but also pathways to the existing workforce via up-skilling.
- Employers and educators must work together to develop a range of apprenticeships at all levels to enable career progression and contribute towards a sustainable workforce.

Skills Priorities 2017

4. Engage SMEs to boost productivity and build capacity for growth



Issue:

With customer expectation around good service increasing; customer service, leadership and management are perceived as the most important skills for future business growth. Additionally, digital marketing and technical skills needs will be valuable to future-proof a business. Without these skills and the ability to react to demand, SMEs risk increased operating costs and losing out to competitors.

Objectives:

- Work with partners and employers to collate intelligence and inform the industry of available provision, current skills demands and emerging skills needs, along with the importance of investing in skills to aid business growth.
- Raise awareness of the leadership and management, digital and customer service training opportunities, particularly the use of apprenticeships to up-skill existing workforce.
- Encourage businesses to engage in staff development with a view to improve retention and cost saving.

5. Enhance equality and diversity through multiple career pathways



Issue:

The visitor economy is the third largest industry employing migrant workers, with 8% of all migrant workers in the UK working in hospitality roles⁽⁵⁾. The threat of a much wider skills shortage looms following the vote to leave the EU.

Objectives:

- Encourage recruitment and promote the sector via sustainable but flexible labour pools, such as older workers and women returners, who may already have general business skills and increase competency of the workforce and retention.
- Encourage more businesses to take advantage of the benefits behind apprenticeships at all levels in order to future-proof their workforce.

Regional Centres of Excellence and Research

- Destination Bristol
- Destination Bath
- Bath BID
- North Somerset BID
- Bristol BID
- People 1st
- Springboard

Key Providers

- Bath College
- City of Bristol College
- Weston College
- South Gloucestershire and Stroud College
- NGaged Training
- HIT Training
- Lifetime Training
- Interserve

Professional Networks and Organisations

- People 1st
- Springboard
- Hospitality Guild
- Destination Bristol
- Visit Bath
- Bristol Hoteliers Association
- SW Tourism Alliance
- British Hospitality Association (BHA)
- The Chef's Forum
- Institute of Hospitality (IOH)
- British Institute of Innkeeping (BII)
- British Beer and Pub Association (BBPA)
- Tourism Society
- The Institute of Travel & Tourism
- Academy of Food and Wine Service (AFWS)
- Craft Guild of Chefs
- Royal Academy of Culinary Arts

Endorsed by

Colin Clark, Visitor Economy Sector Group Chair, West of England LEP

Reference Documents

- 1) Visit England – The Value of Tourism in England
- 2) Tourism Alliance – UK tourism statistics, 2016
- 3) West of England LEP – EMSI
- 4) British Hospitality Association – Annual Report, 2016-17
- 5) West of England LEP skills prospectus 2017 for Visitor Economy
- 6) People 1st – The Skills and Productivity Problem, 2015
- 7) West of England LEP Employer Skills Survey, 2016
- 8) Sunday Times Best Places to Live Guide, 2017

Employment Areas Chart – NGaged Training / LMI Statement 2017 based on Labour Insights, May 2016 - May 2017 & EMSI

Advise, connect, support

Get in touch today



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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.