

NTG ALLIANCE

COUNTRY INTERVIEW REPORT

UNITED KINGDOM

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Table of Contents

	<u>Page</u>
Background	2
Theme 1: NTG Skills Sets	3
Theme 2: The Future of Tourism	12
Theme 3: Digital Skills	14
Theme 4: Green Skills (environmental management)	16
Theme 5: Social Skills	18
Additional Notes	20

Background: A general overview of the Next Tourism Generation Alliance project, and the number of interview participants per subsector in this country report.

The **Next Tourism Generation Alliance (NTG)** is the first European partnership for improving a collaborative and productive relationship between education and industry, funded by European Union. The NTG Alliance has partners from 8 countries (Spain, UK, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland), and will provide employees, employers, entrepreneurs, teachers, trainers and students with a set of Core NTG modules in digital, green and social skills.

Goals of the NTG Alliance are:

- To establish a Blueprint Strategy for Sectoral Skills Development in Tourism to respond to the fast changing and increasing skills gaps in digital, green and social skills sets;
- To define a scalable mechanism and model for sustainable and digital curricula between the industry and education providers at regional, national and European level;
- To create transformative cooperation in five key tourism sub-sectors: hospitality, food and beverage operations, travel agencies and tour operators, visitor attractions and destination management;
- To develop, deliver and test Next Tourism Generation (NTG) Skills Products for professionals, trainers, students, university tourism departments, local authorities, companies to respond to the fast changing and increasing skills gaps in digital, green and social skills sets.

Should you wish to know more about the Next Tourism Generation Alliance project, please visit www.nexttourismgeneration.eu

For getting involved in the project (as a community member, affiliate partner or associate partner), please visit nexttourismgeneration.eu/contact/

Sample

Number of respondents interviewed for this report: 50

- Tour operators / travel agencies: 8
- Destination management organizations: 13
- Attractions: 9
- Accommodation: 11
- Food & beverage: 9

Theme 1: NTG Skills Sets: A summary of respondent's ideas of the current skills needs (social, green, digital), shortage of skills and training provision.

Tour Operators and Travel Agents

Social Skills

Skills needs, shortages and training provision differ across tour operators and travel agents, however, social skills and especially customer service skills are generally strong amongst the workforce. Most organisations include customer service skills in their induction training. One company uses the WorldHost programme to upskill staff in this area. This training also enables staff to deal with diverse customers and specific needs. A large commercial organisation has an operational training team, which offers a full induction programme that includes face-to-face soft skills training. The organisation also provides eLearning on equality and diversity and disability awareness so that staff can provide a tailor-made service to customer needs.

Leadership skills are also at times lacking within the industry, especially in terms of how to upskill staff, motivate employees and see potential in recruits who might not have extensive experience.

“Leadership and management will need to become more transparent in the future which will galvanise trust in the workforce and employee feedback will be sought to a greater extent which will foster employee engagement.”

Travel Agent

In Wales, customer service and communication skills are very important. One small business highlighted that a young employee with sufficient customer service skills is hard to find. The owner said that social skills need to be developed in school where hospitality should be promoted as a viable career. Language skills needed by this business are Welsh and Mandarin speaking tour guides of which there are few. Government funding for WorldHost training has ended.

A Welsh company that specialises in coach tours has a lack of skilled driver coach drivers. Young people are reluctant to join the profession, as it is not seen as an attractive career because the hours can be unsociable and the work manual. There is also a shortage of Official Tour Guides. Blue badge guide training is not regular and there is no alternative training provision.

Green Skills

One organisation representing a number of travel agents states the industry is lacking in green skills and initiatives need to be led by tour operators to educate not only travel consultants but also consumers. British consumers traditionally want package holidays and have been used to the ease of travel so have not really considered sustainable options as much as perhaps people do in other countries.

In Wales, two small tour operators did not identify environmental management as an important area for skills development. Both directors are mindful of reducing printing, encouraging recycling etc.

Digital Skills

Generally, there is a deficit of digital skills across the industry with a large proportion of companies lacking basic digital skills such as setting and managing a Facebook page. Many companies rely on customers booking with them in person; however, there are opportunities in using digital tools to complement that. Smaller companies tend to recruit individuals with lengthy sector experience, however, this might mean that those individuals have not grown up with technology and are lacking some of these skills. Additionally, it is reported

that smaller businesses do not have the budgets to upgrade technology and train for related skills. In contrast, one large travel agent reports recently having launched a digital academy programme that looks at how to foster digital skills within the existing workforce as well as how to attract new recruits who are digitally skilled.

In Wales, two small tour operators mostly provide staff with in-house digital training to reduce costs. Specialised digital skills such as graphic design, marketing and copy writing are outsourced by one tour operator, as employing one person with this full skill set would be too expensive. Another small tour operator provided web site training for staff through an external private provider but this was expensive. Both businesses stated that older employees required digital skills training. One company is considering sending staff on ILM Leadership training. Online training videos are used e.g. accounting programmes.

Destination Management

Attracting talent is the main issue facing tourism sector employers. The sector is heavily dependent on migrant workers and with Brexit looming this has created uncertainty and already the sector has experienced recruitment issues because of this. Hospitality Works is an initiative that aims to boost the reputation of work in the sector and create a larger employment pool. The initiative has created more than 8,500 new career starts for jobs seekers since 2015. It involves encouraging employers to run taster sessions for unemployed people and holding recruitment events at local Job Centre Plus.

Social Skills

Customer service skills have always been taken very seriously by the industry and businesses use customer feedback to a great extent. In Northern Ireland and Scotland, the WorldHost and Glasgow Welcome programmes have been very useful in upgrading customer service skills across the industry.

In Wales, WorldHost was promoted by Visit Wales although funding for this training has been cut. There are licensed trainers and occasionally tourism associations have collectively organised customer service training. There have been various Ambassador Schemes across Wales that train businesses and local volunteers on how to interact and provide local knowledge to visitors, although continuity of some schemes has been challenging post-project funding.

There is a lack of soft skills and people skills in employees joining the sector. There is also a recognition within the industry that Leadership & Management skills need to improve. Particularly around people management such as retention and motivation activities.

“If you get Leadership & Management right within a business, everything else falls into place. If you have management that understands how to treat and develop their staff, it is unlikely that you will have skills gaps.”

Destination Management Organisation

Green Skills

In Scotland, England and Northern Ireland, green tourism is becoming more popular and visitors are increasingly looking for businesses that have sustainability on their agenda. A large number of businesses are not aware of what they can do more of in terms of being sustainable and reducing their carbon footprint. An organisation called Zero Waste Scotland has done quite a lot of awareness raising and training. It offers packages to businesses that includes training, funding, tailored advice and specific tools delivered online, on-site or over the phone. Larger organisations are implementing green initiatives but smaller sized organisations lack awareness in terms of sustainability. Often this is due to a lack of time to upskill themselves or their staff.

In Wales, there has been limited participation in green accreditation schemes that mentor businesses on environmental management due to the cost and as there is not a strong enough evidence base to demonstrate

that addressing sustainability will enhance profitability. Guidance is available in the form of toolkits but this guidance is either not known about or not read. Arguably, addressing environmental management is not only a question of skills but also cost and/or a lack of infrastructure. For example, businesses need to pay for recyclable waste collection. There is also a lack of recycling units in rural areas. Furthermore, older properties are difficult to modernise and make more energy efficient.

Digital Skills

Generally, there is a gap in terms of digital skills across the industry. Smaller organisations are generally busy with the daily running of their businesses and have not necessarily realised the value in using technology to improve business operations. To attend a training course, they would have to take a day off and many are not able to do so. Getting organisations to realise the long-term value in developing digital skills to move their businesses forward is a challenge. There are current skills gaps in terms of digital marketing, website and social media presence as well as in terms of content quality. Larger businesses have significant resources invested in digital technology and skills. Many businesses outsource IT, however some of these outsourcing companies lack tourism specific digital skills.

In Wales, a government department called Business Wales runs a Business Online Support Service (BOSS) that holds free online and classroom training courses e.g. marketing, social media. However, the courses are generic and not tourism specific. Feedback also suggests that learning is constrained by the spectrum of knowledge in the classroom i.e. absolute novices to knowledgeable business staff.

“Providing the right training pitched at the right level is problematic, and I’ve experienced it myself. I signed up for a ‘Dynamic Social Media Workshop’ only to find that several attendees didn’t know how to set up a Facebook page let alone be dynamic with it. I learnt very little and left the workshop feeling I’d not learnt anything new.”

South Wales Tourism Marketing Officer

Regional tourism business associations in Wales organise regular digital skills workshops and mentoring for members. The view expressed was the benefits members derive from attending workshops relate at least as much to the opportunities to network with other businesses as the content of the workshop. Businesses find these events an opportunity to share ideas, support each other and provide reassurance. A small business has to be very motivated to access an online training module. As in the rest of the UK, trade association members (mostly small businesses) need training but their availability is very limited. Moreover, there is an expectation that training will be free or subsidised.

An organisation in Northern Ireland provides a range of toolkits and resources to help businesses develop digitally such as guides to using social media, google analytics and websites for marketing purposes. The organisation recently launched the Tourism Enterprise Development (TED) programme to address the gaps and opportunities for growth as identified by local businesses in terms of digital development. The programme helps businesses gain access to training and resources needed to reach the next level. The organisation also offers a digital health check where a specialist will look at a business’s online presence and IT and offer specific recommendations on how to improve. Tourism is seen as a blank canvas for technological innovation so partnerships between local businesses and technology companies are key. The organisation has hosted a number of competitions to encourage partnerships. For instance, an Augmented Reality challenge with a £200K prize to find solutions to help visitors discover and encounter new experiences while also encouraging them to stay longer and spend more.

Attractions

Currently the talent pool within the tourism industry is reducing as new businesses start up and compete for staff as well as staff from EU countries leaving due to the Brexit uncertainty. One organisation finds it difficult to recruit managers with relevant visitor attraction experience - this is an issue across the industry and the organisation is working with the Hospitality and Tourism sector partnership in Northern Ireland to minimise this skills gap. The organisation is looking to set up an in-house academy and through this develop a leadership and management pathway. The tourism industry as a workplace needs to be better promoted and potential recruits need to be offered placements to give them an idea of what working in the tourism industry is like. The organisation attends recruitment fairs and university events with the majority of employees being sourced from these. To try and encourage people to join the organisation, it provides a range of benefits such as flu jabs, eye care scheme, and high street discount scheme and for shifts after 10pm, employees are provided with free transport. The organisation has also chosen to focus on recruits having the right attitude rather than experience in order to provide an opportunity to those who might not have had a job before. New recruits are provided with a one-day induction training covering health & safety and customer service skills – this training is delivered in-house. Recruits are then offered specific departmental training across 1 to 2 weeks. Training available to all staff includes dementia awareness, data protection and disability awareness – this type of training tends to be delivered by external organisations.

“The tourism industry as a workplace needs to be better promoted and potential recruits need to be offered placements to give them an idea of what working in the tourism industry is like.”

Visitor Attraction Organisation

Social Skills

In Wales, the organisations interviewed universally identified the social skill set as the most important for the success of their business. Several mentioned that key criteria for recruiting customer-facing staff included a warm personality and an interest in people.

One large Welsh organisation currently contracts a private training organisation to run customer service training tailored to their sites and monuments, which is mandatory for their custodians. Smaller organisations are more likely to provide social skills training as part of induction and on-the-job training.

All identified the need to attract new audiences from a wider demographic to become interested and engaged in the work of their organisation so in future staff training will need to prepare staff for different customer demands and how to meet them.

One Welsh organisation referred to their ‘Visitor Experience Strategy’ from which a Customer Charter is being developed. Once published this will be in the public domain so it will be critical to train staff to ensure the standards set out in the charter are met.

Some heritage organisations referred to the need in future for sites to encourage visitors to interact with exhibits and share their views. The organisation will have to have the skills to respond effectively.

The ability to communicate in languages other than Welsh and English was felt to be useful and some have engaged customer-facing staff with foreign language skills but in reality, it was felt more important to have site information and interpretation available in a range of languages.

One organisation stated that it expects the numbers of Chinese visitors to increase in the near future so the organisation suspects that some aspects of cultural awareness might need to be revisited. It is currently raising awareness of Chinese culture and what these types of visitors might need and expect. When looking at new types of visitors, the organisation puts together a working group that looks at that particular culture and what specific skills and knowledge the employees might need. This could result in staff training or general awareness

raising. It could also result in a change in practice such as the introduction of a new payment system that might be preferred by these new visitors.

Green Skills

Larger organisations in Wales are conscious of their responsibilities in terms of environmental management. Some are signed up to the Carbon Literacy scheme under which staff are invited to attend a one-day course. In some organisations specialist staff e.g. rangers, gardeners, property services are recruited for their skills sets in environmental management. Apprenticeships and other entry routes to these specialist roles are offered by some organisations.

In all cases the ways in which staff can take practical steps to reduce the organisation's carbon footprint e.g. recycling, switching off lights are included in induction programme. However, beyond these common sense measures the smaller organisations interviewed did not consider this an important area for development for their customer-facing staff. Some mentioned that their rural location made it difficult for both customers and staff to access the site other than by private transport, a situation unlikely to change in the near future.

Digital Skills

In Wales, the digital skills needed by staff in smaller organisations are basic and the focus is on usage i.e. using on-line booking system. In-house training ensures staff are competent in using the organisation's systems. The importance of a website is recognised – smaller organisations may contract out the development and management of their website.

All the organisations in Wales mentioned the importance of using social media for marketing purposes. Most think at present they have sufficient skills in-house to engage with this, although finding the time to do so is a challenge for smaller organisations. For the future, it is recognised that the level of social media activity will need to increase particularly if 'non-traditional' visitors are to be attracted to heritage attractions.

Some larger organisations are increasingly investing in digital apps to create trails around the attraction and Virtual Reality to tell stories and enhance the visitor experience. The development of the apps and the technical programmes behind the VR experiences is contracted out to specialist organisations. However, staff need to be au fait with the apps so they can assist customers when necessary. Currently this training is carried out in-house by the individual app design companies.

The Welsh museum mentioned a major project of digitalising their huge collection of artefacts, which needs to be undertaken in the near future. This will be a specialist task, but achieving this would greatly enhance the visitor experience.

Food & Beverage

With the uncertainty of Brexit and the recruitment challenges that comes with that, there is a shortage of skilled kitchen staff and chefs so there is a need for encouraging those who traditionally have not joined the industry such as older age groups, people with disabilities or working parents to take up certain roles. One organisation's recruitment strategy is to 'recruit personality and train skills' as this widens the talent pool.

"Promoting hospitality as an attractive career choice is a key issue now and will continue to be so in the future. This issue needs to be backed by the entire hospitality industry."

Food & Beverage Organisation

In Wales, there has been a significant shortage of chefs and skilled kitchen staff for many years. The career image and working conditions need to be improved. In small food and beverage businesses, much training is delivered internally on the job. Businesses do not always know when external training is being provided and the quality of external training is variable, particularly as some trainers lack sector specific knowledge.

"At times it's just a small tick boxing action for the provider and the trainee/business. A lot depends on the quality of the training, it needs to be meaningful and carry on after the event."

Mid Wales Gastropub Owner

One large organisation's workforce suffers skills gaps in relation to functional skills such as numeracy and literacy. The organisation recognises the value that apprenticeships bring but one of the difficulties with apprenticeships, both for the organisation and the apprentices, is the functional skills element. There are many people who would make great apprentices and subsequently employees but because their English and math skills are not particularly good, they are excluded. The organisation has tried to support people with these skills gaps such as by paying for additional training but there are still some who cannot pass the functional skills requirement. The organisation feels that although they are important, the level of the functional skills required is perhaps not always necessary for the roles within the organisation. A certain level of English and maths is still needed to fill out compliance forms; however, this could be made easier with technology. The organisation will still let those internal staff who have not passed functional skills take part in the apprenticeship training (without the qualification aspect) as not to discourage genuine interest.

Social Skills

One large organisation in 2018 introduced soft skills workshops for all managers, including an inclusion and respect workshop to make staff aware that certain behaviours that traditionally have been associated with the industry are no longer acceptable. All staff take part in equality and diversity training as part of their mandatory eLearning. The organisation also hosts a training session entitled "Managing a Modern Workforce" which looks at how to increase a part-time and full-time mix and encourage millennials to join the business.

Obtaining staff with the required social skills to work in food and beverage businesses in Wales is challenging. Businesses thought that young people should start careers earlier (from 16 years) and learn "people skills" i.e. how to interact with customers. Key skill shortages include hospitality, communication, language(s), numeracy, literacy, adaptability and resilience. Businesses recognised the importance of accessible tourism.

Green Skills

Generally, the food and beverage sector is quite adept at using green initiatives to save on utilities bills and promote local produce, however, the need for upskilling staff has not yet been considered. One organisation reports that the running cost of a restaurant is very high so using green initiatives to reduce costs can be quite effective. For example menu engineering to reduce food waste, recycling materials and using sustainable sources of energy. The organisation has removed plastic straws from its restaurants and is looking to further

eliminate the use of plastics. It is also taking part in the Waste Not Want More initiative that looks at reducing food waste e.g. using potato peel and fish trimmings in dishes. Not all staff in the organisation have the required green skills; however, awareness raising is part of the induction training. In future, the organisation will look at holding training around green skills and initiatives.

In relation to green skills, small food and beverage providers in Wales highlighted that the commercial reality is that guests in general are not very interested in how the business is being sustainable. In addition, there was not sufficient local produce available to source to maintain a superior guest experience. Few restaurants have green accreditation. An organisation called WRAP Cymru has produced guidance for large and small businesses on how to prevent food waste in Wales. The extent to which this guidance is accessed and used by businesses is not known.

Digital Skills

The use of digital marketing by small food and beverage providers is variable. The importance of digital skills and influencing through social media is recognised but soft skills remain core because the industry is about engaging with people. Small businesses lack the time and resource to manage digital platforms.

“People say that social media is great as it is free – it may be but it takes time and you need to develop skills such as photography, video production, copywriting, IT skills to name but a few. I have been on a variety of courses and always come away full of good intentions, putting those into practice however is hard. My list of things to do is always never ending.”

Welsh Food Tour Guide

Food Skills Cymru offers mentoring and workshops to support businesses to source, serve and sell Welsh food and drink that includes digital marketing.

Accommodation Providers

Accommodation providers have noticed a decline in the talent pool thought to be due to EU nationals moving out of the country because of Brexit. One large organisation works in partnership with local catering colleges to optimise their talent pipeline in the UK and to encourage colleges to deliver a level of training relevant for the industry today and in the future. This collaboration also helps colleges build relationships with employers and increases the organisation’s talent pipeline, particularly for the food and beverage subsector. The organisation expects to include more colleges at higher education level rather than degree level in the future.

Another company worked hard locally at addressing the negative perceptions people had about working in the hospitality sector regarding seasonality and working long hours. To tackle this, the organisation offers year-round 40-hour contracts during the year with staff working longer hours in the summer. Staff are allowed to take time back during the winter when the demand for the business has decreased. The organisation also tries to recruit internally, rather than externally, and it has set career progression charts that include the skills people are required to have, what is expected from them, as well as providing in-house training to fulfil these requirements. The organisation also pays staff more than most of the surrounding businesses. These initiatives have reduced the organisation’s turnover rate to 4.7% whereas in other parts of the industry this is much higher.

Social Skills

There is a consensus within the industry that younger recruits lack some social skills, as they are not necessarily developing in environments where they have social face-to-face interaction on a regular basis and more time is spent on social media instead. To counteract this, one organisation works in collaboration with local colleges in the UK to ensure the curricula includes the development of social skills.

Green Skills

Generally, the accommodation sector is quite adept at using green initiatives to save on utilities and reduce carbon footprints, however the need for green skills in staff have not yet been considered. One organisation has a working group of employees across all levels that promote green initiatives within the workplace. The organisation supports two homeless charities and provides these with office equipment, furniture, toiletries and other items that are surplus to requirement. Staff have their own swap scheme where they bring in items they do not want or need and then swap with others. All the lightbulbs in the organisation are LEDs and single use plastics have been removed wherever possible. The organisation also has a biomass boiler instead of gas central heating and uses water from underground rather than from traditional water reserves. This has saved the organisation in terms of utility bills.

In Wales, there are various green accreditation schemes for accommodation. For example, Green Key, Green Dragon, Green Tourism Business Scheme and the David Bellamy Conservation Award Scheme run by the British Holiday and Home Park Association. There is good awareness of environmental issues but limited adoption of measures.

“There is a good awareness of green issues and the impact of matters such as plastic, climate change and large-scale agricultural practices. Sustainability is currently something businesses do by choice, rather than as a requirement.”

Guesthouse Owner, North Wales

Skills are lacking particularly in supply chain management and there is a need for explaining and demonstrating the benefits that accrue from taking sustainability issues seriously.

Digital Skills

Some organisations have noticed a shortage of digital skills in older generations that did not grow up with computers. One organisation suggests colleges and schools could teach software packages similar to the ones being used in the industry and link digital skills with the industry’s needs rather than just teach digital skills at a generalist level.

In Wales, the use of digital marketing by SMEs varies significantly. Trade associations are providing mentoring on social media as well as discussing booking systems and channel managers.

“What many people found helpful was the information itself is one thing but being able to trial and experience and see what others have is key to this, so co-operative working between the ‘haves’ and the ‘wants’ is vital. It wouldn’t work by having presentations from channel managers that wouldn’t be the same. People who need advice don’t need sales pitches, they need actual honest feedback and to be able to see these systems in action.”

South East Wales Accommodation Supplier

Visitor accommodation with websites that clearly link to their social media platforms, who use online booking agents to boost sales and have excellent customer service are most successful.

“I support a variety of tourism businesses; every one of them is different with varied digital marketing knowledge and skills. Some are on top of their game and are using social media platforms, online booking agents and fully understand the importance of digital marketing. Whilst others do not use any form of digital marketing to promote their business. The visitor accommodation sector is the most challenging to convince that digital marketing is crucial to their business.”

South Wales Tourism Marketing Officer

“The skill is using digital and your customer service skills to ensure that, whilst a guest might be sourced originally from somewhere that costs commission, the guest has such a great visit that they will book again and again in the future direct with you.”

North Wales Guesthouse Owner

Theme 2: The future of tourism. A summary of respondents' ideas of tourism and the tourism industry in general and his/her company in particular in ten years' time (2030).

Tour Operators / Travel Agents: what will tourism and the industry look like around 2030?

Visitors from non-English speaking countries are likely to increase in both Northern Ireland and Scotland and this might pose a problem in terms of language and cultural barriers.

In the future, there will be a greater emphasis on USP differentiation by service and by brand. Customers will require more tailor-made packages and will be more informed having been able to conduct their own research prior to contacting a travel agent. There will be a strong emphasis on service quality and service delivery. 2030 will still find travel agents/consultants on the high street perhaps operating on more of an appointment basis. The opportunities will still be there for travel agents, especially when it comes to providing customers with a more unique experience that goes beyond just booking flights so that a trip becomes bespoke to a client's needs. There will also be more demands from the consumers in terms of corporate and social responsibilities so there is an opportunity for agents to tailor-make packages with this requirement in mind.

In 2030, attracting the right people with the right skills will be crucial. Employing homegrown talent and those with language skills will become even more important in the future. Having the right digital skills will also be key, especially in terms of proactively putting digital skills and tools in use that can make employees work more efficiently.

In Wales, tour operators highlighted the future importance of enhanced digital connectivity in the destination, the creative development and diversification of more experiential products, as well as better language and cross-cultural skills.

Destination Management: what will tourism and the industry look like around 2030?

The cost of labour will increase in the future. Jobs will demand higher skilled workers and the employment pool will shrink. However, job roles will become more labour productive. Immigration policy will have a knock-on effect on the labour market with roles harder to recruit and using mainly a domestic workforce.

The way that tourism is perceived generally will change quite significantly over the next decade. In the future, tourists will not view themselves as tourists but rather as adventurers or explorers and they will want to immerse themselves more in a locality. They will want to get involved in things at a more local level and will want to live like locals. They do not want to be treated differently just because they are from another country. There is also a suggestion that there will be an increasing focus on forms of tourism that respects heritage, aesthetics, culture and the well-being of residents. Food tourism focussing on different cuisines and rich storytelling will also increase.

"Customers are increasingly expecting sustainable products and services, and this will continue in the future. Sustainability is now a key consideration particularly for event organisers and accommodation providers in Scotland. In the future eco-tourism in Scotland will grow and tourists will visit a destination with a view to do something that will benefit that location such as charity work or take part in for instance beach cleaning."

Destination management organisation

Attractions: what will tourism and the industry look like around 2030?

Brexit has the potential to have a big impact on the future of tourism in Northern Ireland in terms of the border situation as well as shrinking the recruitment pool if immigration control becomes stricter. Currently the talent pool within the tourism industry is reducing as new businesses start up and compete for staff as well as staff from EU countries leaving due to Brexit uncertainty. In the UK the level of Chinese visitors is due to increase

that will be beneficial to businesses, however, organisations might need to revisit some aspects of cultural awareness to ensure customer needs are met.

In Wales, publicly funded heritage organisations are under increasing pressure to generate income for maintaining the buildings/site. However, this is a big challenge as large-scale commercial activity has the potential to damage the site. A balance between heritage protection and generating income needs to be found but it is not easy to achieve. Increased use of appropriate technology is inevitable in the larger attractions but it is critical that it works well and consistently if visitor expectations are to be met.

The goal of widening the demographic of visitors will be best achieved through partnerships in Wales in order to understand what would attract people from different cultures and backgrounds. Heritage sites are part of wider communities and improved partnership and liaison between local authorities and neighbouring businesses will be vital to future success e.g. improving local facilities. However, all mentioned the need to continue to attract repeat visits from 'loyal' traditional customers as well as attracting new types of visitor.

Food & Beverage: what will tourism and the industry look like around 2030?

Future challenges for the industry will be around automation and artificial intelligence as well as managing a modern workforce who requires part time and flexible working. The industry will also need to encourage those who traditionally tend not to work in hospitality such as students and parents. Flexible working and paperless working will become more prominent in 2030. Historically within the hospitality industry, work life balance was overlooked and many took great pride in working 10-12 hour days but this has changed as people want to spend time with their families and hobbies. Employers however might find it difficult to adapt to these new requirements as the culture is quite ingrained:

"We cannot keep calling millennials snowflakes. We have to adapt to them and we also have to teach them to adapt."

Food & Beverage Organisation

Accommodation: what will tourism and the industry look like around 2030?

Many cite Brexit as deciding the future of the industry. One organisation states that given its increasing international base it has caused issues when signing up long-term club relationships with overseas organisations as many clients are moving their head offices out of the UK.

One organisation suggests that due to the decrease in consumer spending, restaurants in particular are going to have a bit of a rocky time over the next few years. Regarding hotels, the future will be dependent on the strength or weakness of the pound, but also on the vigour of the British business sector because the majority of guests are UK business travellers. Therefore, if the British economy takes a down turn, business will be lost, as some people will decide not to stay away, cut weekends or shorten their stay. In addition, the biggest challenge moving forward will be availability of labour and talent. This will affect all sectors recruiting low paid and low skill roles, which already struggle to retain talent.

Theme 3: Digital skills. A summary of the digital skills rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following digital skills as the most important in ten years' time:

In 2030, the industry will become more intuitive in terms of how customers book their travel. Tools like Alexa will become seamless and predictive when it comes to booking travel, such as knowing someone's preferences when it comes to travel and destinations and customers will increasingly use these tools. Virtual Reality might be used to communicate with customers or to give them an idea of what various destinations might be like. Therefore, travel companies and their workforce will have to align skill sets with this technology.

It is also thought that emails might not be used as much as it is today, instead people will rely more on apps and client portals to access documentation and bookings. There will be an increased emphasis on self-service management of data. Decision-making processes will also change from at times being gut-driven to being wholly reliant on evidence and data.

Roles that today do not need digital skills might do in 2030. For instance, a coach company thinks that manual safety checks could become digitalised and if that were the case, drivers would need to be upskilled. Digital skills in the areas of social media, marketing and data protection will continue to be important in the future and employees will need to be trained as this technology changes.

The respondents working at destination management organizations consider the following digital skills as the most important in ten years' time:

The workforce will need to become more digitally literate in the future and the industry will need to use a more technological approach to service, especially around the ordering and delivering of goods as well as buying and selling patterns. Digital marketing, analysis of big data and automation will continue to grow and so will the associated skill requirements.

In 2030, it will be important for businesses to understand the concept of immersive technology in order to animate the experiences they offer. They also need to realise how AI can be used to create personalised itineraries for visitors. In-depth understanding is not always necessary, as specialist functions can be outsourced. The key is for businesses to consider their brand and digital strategy and to have good content that can be promoted on various digital platforms.

"The digital skills requirement for businesses will continue to grow in the future and businesses will need to become more adept at thinking about their own brand and creating a digital strategy."

Destination Management Organisation

The respondents working at attractions consider the following digital skills as the most important in ten years' time:

Digital skills will become more important, both in terms of how to operate businesses as well as how to improve the visitor experience. Therefore, the digital skill levels in staff will need to increase in the next coming years. Skills gaps will be bridged by looking at particular digital skills when recruiting. For one organisation, these digital skills mainly refer to the operation and maintenance of digital technology within their visitor gallery such as particular software used in exhibitions or to guide visitors.

In Wales, most respondents felt that as digital technology is developing so fast it is very difficult to predict the skills that will be needed in the future. The potential for using digital technology to enhance the visitor experience was recognised. Development of apps is currently contracted out and there was no indication that in-house specialists are likely to be recruited in the near future. Staff will need to be trained to be competent

and confident in using the systems. One organisation identified that as a number of app developers had been contracted for different projects ideally there would be in-house specialists who had a level of understanding of the technology used and had the knowledge and skills to liaise with the developers to ensure the programmes ran smoothly at all times.

Several respondents were are pains to stress that digital interpretation is unlikely to replace human interaction between staff and customers, seen by some as the most critical element of the customer relationship both now and in the future.

The respondents working in the accommodation sector consider the following digital skills as the most important in ten years' time:

Young talent joining the industry have relatively good digital skills and are generally quicker to learn software packages used for operations. Increasingly the industry uses social media platforms, mobile concierge apps and self-check-in so the ability for staff to be able to use and manage these tools are important. PMS (online booking systems) will continue to grow in the future and staff will need to have the skills required to operate these systems. This will not just be for reception/reservation staff but for all staff as more and more functions will move across to these types of booking systems.

Elearning will become a more important training tool in the future as younger people in particular expect to learn using technology, especially tools that can be used on various platforms and at times that are convenient to the user. This will align with the increase of flexible working so those working remotely can access training more easily.

The respondents working in the food & beverage sector consider the following digital skills as the most important in ten years' time:

Increasingly rotas, booking systems and tills are becoming digital and staff skills will need to be updated. Generally, staff from the younger generation that has grown up with technology finds it easier to adapt to digital systems whilst other generations take a longer to train and get used to these systems.

One organisation is currently using different systems for payroll and purchasing however in the future it is likely that all these systems will become integrated. For instance, the booking system will “talk” to the rostering system and influence how rotas are created and managed. This will be a less labour-intensive system and will not require a high skill set to operate. Therefore, staff will have more time to spend on improving the guest experience. As technology improves and becomes more user-friendly, related training sessions will become less complex and shorter. In the future, the organisation predicts that staff will need skills around managing automation such as the use of e-menus.

Another organisation envisages that the process of service will not alter too much by 2030. However, as current equipment is replaced with digital equipment, staff will need to be trained on how to use this new equipment.

Theme 4: Environmental management ('green') skills. A summary of the environmental management skills rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following environmental management skills as the most important in ten years' time:

Generally, it was quite difficult for organisations to predict future environmental management skills as many organisations made little use of currently of green skills. Organisations were more confident talking about green initiatives rather than related skills. Many did however think that environmental management skills would become more important in the future, as customer requirements in terms of sustainability will increase.

One organisation stated that there are future opportunities for tour operators to involve local communities and charities rather than for instance offering elephant rides to tourists. In addition, in the future tour operators might be more inclined to switch from large hotel chains to smaller local guest houses so that local communities benefit more.

Another organisation stated that they will make more use of technology to reduce business travel and remote working could reduce emissions from commuting.

The respondents working at destination management organizations consider the following environmental management skills as the most important in ten years' time:

Generally, it was quite difficult for organisations to predict future environmental management skills. Businesses were more confident talking about green initiatives rather than related skills. However, skills related to minimising energy usage, recycling and waste management are considered key.

Within the industry, there will be an increased focus on green businesses in the future. Green initiatives will become part of daily business management as customers are increasingly expecting sustainable products and services. Sustainability is now a key consideration particularly for event organisers and accommodation providers in Scotland. In the future ecotourism in Scotland will grow and tourists will visit a destination with a view to do something that will benefit that location such as charity work or take part in for instance beach cleaning.

The respondents working at attractions consider the following environmental management skills as the most important in ten years' time:

In the future, it is likely that visitors will require certain sustainable features such as minimising plastic waste. One organisation did not anticipate a need for any particular green skills in staff in the future apart from awareness of any potential initiatives.

In Wales, some respondents from smaller organisations did not feel this was an important area for skills development. Several larger organisations had made a public commitment to reducing their carbon footprint and this will heighten the importance of all staff having the knowledge necessary to deliver against this commitment. It was felt generally that skills needed were basic for most staff; it was more a question of consistently implementing simple actions that would make a difference.

Apprenticeships and other entry routes for those aspiring to specialist roles in property services or as gardeners or rangers are seen as a good way of ensuring the organisations have the necessary environmental management skills in Wales.

The respondents working in the accommodation sector consider the following environmental management skills as the most important in ten years' time:

Generally, it was quite difficult for organisations to predict future environmental management skills as many organisations made little use of current green skills. Instead, organisations were more confident talking about green initiatives rather than related skills.

“In 2030, the industry will use more and more green initiatives to save on costs. Minimising the use of packaging will become standard as will decreasing the carbon footprint. Customers are becoming increasingly aware of green initiatives and want the services they use to also align with the green agenda.”

Accommodation Provider

For the industry, environmental management skills are another way to save money such as through reusing and recycling as well as monitoring energy usage. Being a green business will not only attract customers but increasingly, potential recruits might be more interested in working for an environmentally friendly company.

The respondents working in the food & beverage sector consider the following environmental management skills as the most important in ten years’ time:

Generally, it was quite difficult for organisations to predict future environmental management skills as many organisations made little use of current green skills. However, organisations did think that there would be much more of a focus on green issues and related skills within the industry such as reducing the use of plastics, increasing recycling and using menu engineering to make use of leftovers and local produce. One organisation predicted it might only use green suppliers and, in that case, staff involved in procurement would have to be more aware of green issues.

Theme 5: Social skills. A summary of the social skills (i.e., personal-, communication/cultural-, and diversity skills) rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

Several organisations in Scotland and Northern Ireland anticipate that visitors from non-English speaking countries will increase and this might pose a problem in terms of language barriers. Therefore, language and cultural skills will become more important in the future.

Customer service and the ability to personalise travel options will continue to be important social skills in the future, however it is thought that customer service requirements will change over time. One organisation thinks that customers will become increasingly time-poor and that this will need to be reflected in how the industry operates. For example, customers might want documentation instantly rather than through the post, so communication with customers might have to be via online chats rather than phone calls or face-to-face meetings. Another organisation believes that customers might value face-to-face contact more in 2030 as everything becomes too digitalised.

Equality and diversity awareness will become more important. It is thought that this will shape leisure and business travel more such as tailor-made provisions for LGBT customers or solo women travellers. Leadership and management skills will also be important in the future.

The respondents working at destination management organizations consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

Organisations stated that skills to cater for an increasingly aging population with various health and mobility issues would become important in 2030. Further cultural knowledge, equality and diversity awareness will in the future form part of a standard skill set required by those working in the hospitality industry. Language skills will also be more important due to increased levels of foreign tourists.

It is thought that customers will become more demanding and expect imminent perfection. They will want everything done instantly, they will want personalised services and products and there will be little room for compromise so the skills of the tourism workforce will need to align with these requirements. One organisation suggested that a customer service baseline should be introduced that sets a standard for all employees and employers. Another organisation felt that there was more that could be done with businesses that interact with tourists and do not realise they are part of the industry e.g. transport providers and that providing them with WorldHost training could be an option.

One organisation stated that in the future, Meta skills in staff will become more of an important requirement as technical skills and knowledge will be of a lower importance as machines learn to carry out related tasks. Meta-skills can be defined as skills that create adaptive learners and promote success in whatever context the future brings such as self-management, social intelligence and innovation.

The respondents working at attractions consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

The level of Chinese visitors is due to increase so one organisation expects cultural awareness might need to be enhanced. In the future, depending on what technology might be used, a different type of engagement and interaction may be required of staff. If international visitor numbers continue to rise there will be a need for staff with language skills and this will be a problem if Brexit tightens immigration control.

Welsh respondents thought people skills will continue to be the most important skill set in visitor attractions. Challenges for the future will include developing social skills and knowledge that will attract and retain a wider and more diverse visitor demographic. This will require staff to gain an understanding of the needs and

interests of a more varied audience and to think creatively about creating and managing the visitor experience to meet them. Meeting the needs of new audiences must be balanced with the needs of regular, loyal customers.

The respondents working in the accommodation sector consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) skills as the most important in ten years' time:

In 2030, training around social skills might become more important as people use technology more and more, which might mean that some social skills are not automatically developed through face-to-face interaction.

One large organisation thinks that leadership and management skills will become more crucial as flexible working will be the norm in the future. Managers will need to know how to manage individuals and how to best address their unique needs and utilise their specialised skills as opposed to a one-type fits-all mind-set. Flexible working will require a cultural shift within the hospitality industry that has traditionally seen very long working days. Flexible working needs to be approached in a proactive manner rather than a reactive manner in order to attract and retain the best staff.

In Wales, it was highlighted that social skills are of prime importance and their importance will not diminish in the future. Customer care must be proactive, pre-emptive, thereby anticipating customer needs. New young staff need to be 'work-ready' – the respondent does not believe this is the case at present and it needs to change. Being 'work-ready' includes a realistic understanding of the challenges of working in the hospitality sector including working patterns, financial awareness, use of equipment, professional manner and appearance, communication skills. Young staff in particular need to develop the skills and confidence to provide excellent customer service and this includes appreciating that each guest is an individual with particular needs and expectations. They also need to have numeracy and particularly literacy skills, away from 'text speak'.

The respondents working in the food & beverage sector consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

It is thought that in 2030, people will want more personalised services and human interaction and so soft skills will be key to getting repeat business. Other social skills important for the future are related to the ability to speak foreign languages or operating technology facilitating being able to talk to people from different countries.

In the future, there will be a continued focus on leadership and interpersonal skills and making sure these adapt to the needs of a changing workforce. The workforce will be transient in the future so staff might only spend 2-3 years in the hospitality industry rather than their entire career, which has traditionally been the case. Therefore, managers will need particular skills to look after this type of staff.

One organisation feels that the requirement for social skills in the industry will not change much over the next 10 years:

“Customers go to the pub to leave their troubles behind and want to feel like they’ve been invited into someone’s front room and that is how they should be treated and that hasn’t changed in the 187 years this organisation has been operating and probably won’t change in the future”.

People Director

Respondents in Wales felt people skills would continue to be the most important skill set. Challenges for the future will include developing social skills and knowledge that will attract and retain a wider and more diverse visitor demographic. This will require staff to gain an understanding of the needs and interests of a more varied audience and to think creatively about creating and managing the visitor experience to meet them.

ADDITIONAL NOTES. A summary of relevant additional comments by interview participants.

Tour Operators and Travel Agents:

2018 brought challenges to the travel industry in terms of regulations such as the abolition of credit card charges for leisure agents and the uncertainty of Brexit.

Destination Management:

The tourism industry in Scotland is facing uncertainty in regards to Brexit and its implications. However, due to the exchange rate, the number of foreign visitors is high so travel operators and hotels have so far not experienced any negative impact. For instance, Edinburgh Airport experienced record numbers of travellers in 2018. Even so, the tourism sector is cautious in regards to what Brexit negotiations will result in.

In Wales, austerity has reduced funding for county councils who play a key role in destination management partnerships and supporting local trade associations. Further, much training provided in Wales has been supported by European funding which is in jeopardy.

Attractions:

Challenges to the industry is the uncertainty of Brexit and any recruitment challenges this might pose in terms of hiring international staff.

The increasing demand for publicly funded attractions in Wales to generate income through commercial activity is set to increase in the future. This will prove a challenge to ensure that increased commercial activity does not damage the buildings and landscapes the organisations are responsible for preserving.

Although much training is carried out in-house in Wales (and one UK wide organisation has a team of in-house trainers who write and deliver training modules) one respondent from a larger organisation identified that training costs were a major consideration so value for money is critical.

A food and drink attraction in Wales made a direct link between increased international sales of the product and increased visitor numbers, hence the two new sites focus on providing more tours and more varied tours or different audiences.

Food & Beverage:

One large organisation envisages that in the future the workforce will place more demands on employers and will want more employee related services to be digital. For instance, physical induction workbooks could be incorporated in eLearning.

One organisation is currently looking at how to use technology to simplify processes such as apps for online job applications or for swapping shifts. Employees today expect paperless processes e.g. they want to be able to access their rotas on their phones.

Accommodation providers:

One organisation mentions digital innovation surrounding new computer-based Building Management Systems which controls and monitors mechanical and electrical equipment such as ventilation, lighting, power systems, fire systems and security systems. These systems have a positive impact from an environmental perspective and resulted in some savings for the company.