



UKINBOUND

THE VOICE OF INBOUND TOURISM

BREAKING THE LANGUAGE BARRIER:

Equipping our Tourism Workforce
for the UK's future



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FOREWORD



I am delighted to present our report on language skills in the UK tourism industry, which we have produced in collaboration with Canterbury Christ Church University.

It has long been something of a cliché that the UK lags behind our international neighbours when it comes to language proficiency. The caricature of the Englishman speaking very slowly and loudly, to bewildered foreign tourists is born out of an age-old complacency and belief in English as the lingua-franca. But this is an out-dated scenario that has no place in a globally focussed economy.

Those of us working in the tourism industry know the importance of having a skilled workforce – to provide a warm welcome and excellent customer service for our international visitors and also to negotiate effectively with overseas operators. All of these skills encourage repeat business year on year making our industry the UK's fastest growing service industry. In 2017, our international visitors contributed an estimated £25 billion to the economy, and if our industry is to continue to grow, then we need the skills to maximise our competitiveness.

In a recent UKinbound member survey, respondents said that 30% of their workforce were from the European Union and for some members - particularly in London - this figure is as high as 90%. The main reasons cited for this high level of EU employees were language skills, cultural sensitivity and customer service. Since the EU Referendum in 2016 there has been a sharp decline in the number of EU workers coming to Britain and a sharp rise in those leaving. This has taken place at a time when the industry is achieving record growth in revenue and visitor numbers to the UK.

If the answer to a reduced pool of EU migrant workers is to grow our own talent then it is clear that the UK “must do better”. This report highlights a shocking decline in the number of students taking languages at GCSE – down 30% since the Government announced an end to the requirement to take a language at that level in 2002. There is a concern at A-level too, with take up also down 30% in the last 20 years. No surprise, therefore, that many universities report a “language teaching crisis” – with many faculties having to close or merge with other disciplines.

The situation is particularly worrying for those courses which are focussed on tourism and hospitality where the number of compulsory language modules is extremely low. It is truly concerning that for those who train the tourism and hospitality leaders of the future, language skills appear to be a “nice to have” rather than a key element of delivering a world-class service.

As we approach the all important Summer season, we need to celebrate the huge contribution which tourism makes to the UK economy. If we are to continue to grow and bring prosperity to communities across the UK, we will need a skilled workforce to help us do so. In a globally competitive market it is time to equip our young people with the language skills we so badly need, and at which the majority of our competitors excel.

Deirdre Wells OBE,
Chief Executive: UKinbound

BACKGROUND

This research is set against the background of recruitment challenges faced by the tourism and hospitality sectors, as outlined in the recent People 1st Report¹. These challenges are compounded by the uncertainties surrounding Brexit and its potential implications for labour supply and the ability of the UK to tap into an adequately skilled workforce. If the UK is to remain competitive in this new political landscape, then there is clearly a need to ensure that home-grown talent can adequately meet demand.

For the tourism and hospitality sectors, language skills are vital. In a recent internal UKinbound member survey, when asked what barriers their members experience when recruiting a British national, 60% responded ‘insufficient skills for the role’ – including foreign language and customer service skills. The most important benefit of employing EU nationals was language skills (particularly business proficient language skills), followed by customer service skills and specific country knowledge. A working definition of business proficient language skills set out by this study encompasses **an advanced level of language skills defined by the ability to communicate professionally in a B2B and consumer-facing role.**

The People 1st Report¹¹ estimates that by 2024 the hospitality and tourism sector will need to recruit an additional 226,000 people into management positions. The Tourism Sector Deal¹¹¹ review of the skills agenda emphasises that ‘it is clear that any material and sudden change in the supply of workers to Britain’s labour market would have serious consequences for the hospitality sector’. The uncertainty of the Brexit negotiations appears to have pushed the tourism and hospitality sectors to a critical point, where they not only have to consider the valuable role of EU workers, but also need to evaluate the potential of home-grown talent to meet the needs of the future inbound tourism industry.

This study presents a supply-focused audit and analysis of the potential talent pool about to enter into career pathways with business proficient language skills, some with additional tourism and/or hospitality specialisms, and the landscape from which this emerges. This has been achieved by an Evidence Review to explore what is currently influencing education provision and attainment in language skills in the UK, focusing on current Government policy and post-16 language teaching in schools and the HE sector, as we move towards a post-Brexit era. Supplementing this is an Audit of Higher Education provision in the UK, focusing on two contrasting areas of provision: Tourism and hospitality programmes to identify provision for language learning within programme structure and modern language degree programmes to explore the visibility of tourism and hospitality as a career pathway.

To explore the research methods and findings in full please refer to the main report which is available on ukinbound.org.



¹ People 1st (2017) *The performance and talent management revolution: Driving productivity in hospitality and tourism. Executive Summary*, June

¹¹ People 1st (2017) *The performance and talent management revolution: Driving productivity in hospitality and tourism. Executive Summary*, June: page 5

¹¹¹ VisitBritain (2017) *Tourism Sector Deal: Informing the Long-Term Tourism Strategy for Britain*. Submission to the Department for Business, Energy and Industrial Strategy (BEIS) on behalf of the Tourism Industry, October: page 43

01 • EVOLVING SKILLS LANDSCAPE

Growing skills gap

The Evidence Review confirms the dependence of UK inbound tourism on the skills of an EU workforce. This is evident in the numbers of EU nationals currently employed in the sector, and in the impact the uncertainty about Brexit is having on skills gaps and employment retention rates, as EU nationals start to leave the UK in numbers. Research by the CBI^{IV}, KPMG^V, People 1st^{VI} and the Tourism Sector Deal^{VII} review demonstrates the extent to which EU nationals have been meeting a skills gap which is not currently capable of being bridged by a home-grown workforce. This mismatch between demand and supply is expected to grow, as recruitment needs are predicted to rise for management positions in tourism and hospitality (in the order of 226,000 people^{VIII}) and for long term employees with a wide range of 'soft skills.'

Post-Brexit skill requirements

As the UK seeks to position itself as a global player in a post-Brexit environment, linguistic and intercultural skills will be at an even greater premium as organisations seek to meet the challenges of the competitive global marketplace. With the British Academy's *Born Global*^{IX} research finding that seven out of ten firms believe that future executives will need language skills and international experience, the tourism and hospitality sectors, which are currently struggling to position themselves as graduate career options of choice, will be forced to compete with other sectors recruiting from the same talent pool. The extent to which UK businesses will be able to access an EU workforce post Brexit to meet this demand is currently uncertain.

226,000
EMPLOYEES
NEEDED TO MEET
ADDITIONAL RECRUITMENT
NEEDS FOR MANAGERIAL
POSTS IN TOURISM AND
HOSPITALITY BY 2024

People 1st (2017) *The performance and talent management revolution: Driving productivity in hospitality and tourism*. Executive Summary, June

“Our ability to succeed in a competitive global environment and achieve the ambitions of a post-Brexit global Britain – as individuals, as a nation or in business – will be even more dependent on having the right set of skills to engage internationally. Language competence is far more than just another tool in the box; it is a prerequisite and a facilitator for the development of a wide spectrum of other skills and attributes.”

Tinsley, T. and K. Board (2017) *Languages for the Future - The foreign languages the United Kingdom needs to become a truly global nation*. British Council: page 32.

^{IV} CBI (2017) *Helping the UK Thrive CBI/Pearson Education and Skills Survey*, July

^V KPMG (2017) *Labour migration in the hospitality sector*. British Hospitality Association, March

^{VI} People 1st (2017) *The performance and talent management revolution: Driving productivity in hospitality and tourism*. Executive Summary, June

^{VII} VisitBritain (2017) *Tourism Sector Deal: Informing the Long-Term Tourism Strategy for Britain*. Submission to the Department for Business, Energy and Industrial Strategy (BEIS) on behalf of the Tourism Industry, October

^{VIII} People 1st (2017) *The performance and talent management revolution: Driving productivity in hospitality and tourism*. Executive Summary, June: page 5.

^{IX} British Academy (2016) *'Born Global: Implications for Higher Education'* *Born Global: A British Academy Project on Languages and Employability*: page 4.

02 • POLICY AND TRENDS DRIVING PROVISION OF HOME-GROWN TALENT

Fewer home-grown linguists

The research documents the reasons for the long-term decline in the production of home-grown linguists over the past 20 years, in the order of a one-third fall in A-level modern language entry figures^x. These reasons include changes in education and language policies, the perception of languages as difficult or 'elite' subjects, and the lack of clear career pathways. Social, regional and gender inequalities in the uptake of languages are striking, with the greatest decline in language take up at secondary level occurring in schools in areas of high socio-economic deprivation.

Growing language diversity

Accompanying the overall decline in the study of modern languages, is a shift away from the dominance of French and German, to Spanish, and increasing uptake of 'other' languages (e.g. Mandarin and Arabic) which are in line with the UK's key inbound growth markets. However, the development of a home-grown talent pool in these languages remains somewhat slow and limited.

Need for a UK coordinated languages policy

Despite the lack of a coordinated languages policy, a strong lobby is building in favour of establishing an appropriately resourced national strategy for languages. Initiatives such as the *Mandarin Excellence Programme*^{xi} and *Routes into Language*^{xii} have tried to address language education needs in schools, but have raised concerns about the long-term sustainability of such initiatives when not set within the framework of a coordinated language strategy.

Changing nature of language skills

The understanding of 'language skills' is evolving beyond the technical mastery of a particular language to a model of 'plurilingualism' which emphasises the capacity to move across linguistic and cultural boundaries, the development of 'cultural empathy' and the ability to develop a 'linguistic repertory' covering a range of linguistic skills. This has implications for the way in which languages are acquired.



1/3 1996-2016
FALL IN A-LEVEL
MODERN
LANGUAGE ENTRIES

Across the languages:

FRENCH
22.7K DOWN TO 8.5K

GERMAN
9.3K DOWN TO 3.4K

SPANISH
4.1K UP TO 7.5K

Tinsley, T. and K. Board (2017) *Language Trends 2016/17 – Language Teaching in Primary and Secondary Schools in England Survey Report*. British Council: page 20.

34% 2017 EMPLOYER
SATISFACTION
WITH SCHOOL/COLLEGE LEAVERS'
FOREIGN LANGUAGE SKILLS,
COMPARED TO 42% IN 2016

CBI (2017) *Helping the UK Thrive CBI/Pearson Education and Skills Survey*, July: page 34.

70% OF ORGANISATIONS
BELIEVE FUTURE EXECUTIVES
WILL NEED LANGUAGE SKILLS
AND INTERNATIONAL EXPERIENCE

British Academy (2016) *'Born Global: Implications for Higher Education'* *Born Global: A British Academy Project on Languages and Employability*

^x Tinsley T and K Board (2017) *Language Trends 2016/17 – Language Teaching in Primary and Secondary Schools in England Survey Report*. British Council: page 20

^{xi} UCL (nd) *Mandarin Excellence Programme* Institute of Education, IOE Confucius Institute for Schools <https://ci.ioe.ac.uk/mandarin-excellence-programme/> [accessed 25/5/2018]

^{xii} Leadership Foundation (2016) *Options for a sustainable programme of demand-raising activity in modern languages*. Report to HEFCE by the Leadership Foundation for Higher Education. Leadership Foundation/HEFCE, July

03 • CAREER PATHWAYS AND PERCEPTIONS OF THE INDUSTRY

Tourism and hospitality invisible as careers

Tourism and hospitality were hardly visible as career pathways for modern linguists. The audit of modern language programmes revealed a lack of information and awareness concerning career opportunities or the desirability of tourism and hospitality as career choices, suggesting potential scope for the tourism industry to take a more active role in promoting itself as a graduate career option to modern linguists.

Stronger industry voice needed

The audit of language provision within the undergraduate and postgraduate tourism and hospitality programmes, revealed that only 29% and 6% of programmes respectively offer modules in modern languages; most as options. International opportunities, not necessarily linked to language competence, are, however, far more widely offered. A stronger industry voice about the demand for modern languages within the sector would help universities promote programmes in tourism and hospitality with stronger language elements. This will help to build more recognition of the demand for such graduates and further strengthen the image of the industry as a 'career of choice'.

Growth in combined degrees and IWLP

The Audit confirms trends identified in the Evidence Review relating to the changes in modern language provision at university with the diversification of the combined programme offer^{xiii} and the rising popularity of IWLP (institution wide language provision) in which languages are offered as an adjunct to other degree programmes. However, this is set against a backdrop of long-term decline in the numbers of students studying modern languages at university^{xiv}.

^{xiii} Times Higher Education (THE) 2017 'Do we need modern language graduates in a globalised world?' 23 February www.timeshighereducation.com/features/do-we-need-modern-language-graduates-in-globalised-world [accessed 23/5/2018]

^{xiv} Leadership Foundation (2016) *Options for a sustainable programme of demand-raising activity in modern languages*. Report to HEFCE by the Leadership Foundation for Higher Education. Leadership Foundation/HEFCE, July

AUDIT 2018:

Undergraduate and Postgraduate Tourism and/or Hospitality Programmes in the UK



UNDERGRADUATE PROGRAMMES

78 INSTITUTIONS

Offer a variety of **196** Tourism and/or Hospitality Programmes (Single/Combined)

LANGUAGE OPTION

29% of the **196** programmes offer a language to their students. **9** provide it as a core module.

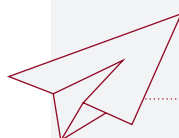


- Arabic
- British Sign Language
- French
- Gaelic
- German
- Italian
- Japanese
- Mandarin
- Spanish

INTERNATIONAL OPPORTUNITIES

43 out of 78 Undergraduate Institutions offer placement opportunities through the following programmes:

Exchange Programme
Erasmus Programme
Go Global Programme



POSTGRADUATE PROGRAMMES



45 INSTITUTIONS

Offer a variety of **87** Tourism and/or Hospitality Programmes

LANGUAGE OPTION

Only **6%** of the programmes offer a language as an optional module to their students as part of the validated programme

- Arabic
- British Sign Language
- French
- Gaelic
- German
- Japanese
- Mandarin
- Spanish

LANGUAGE OFFERS

INTERNATIONAL OPPORTUNITIES

10 out of 45 Postgraduate Institutions offer opportunities to go abroad:

International Live Project Management
Go Global exchange programme
International field trips
Research/Work placement abroad
Exchange programme



The Breaking the Language Barrier Research has been undertaken by the Tourism and Events Research Hub, Canterbury Christ Church University, for UKinbound

The Tourism and Events Research Hub at Canterbury Christ Church University aims to provide a clearly defined research and knowledge exchange offer to the visitor economy. It brings together a team of researchers with areas of expertise ranging from tourism, culture and the arts, stakeholder analysis, UK policy, destination management and education/training provision to collaborate on research and consultancy projects.

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UKinbound was established in 1977. We are the only trade association that represents the interests of the UK's inbound tourism sector and ensure it is recognised as a leading economic and employment driver in the UK. We help our diverse membership of nearly 400 businesses all across the country to grow and develop via a programme of events designed to connect buyers and suppliers in the travel trade. We also provide marketing opportunities, market seminars, and access to the latest industry insights. In addition, we lobby Government on behalf of our members on key industry issues such as taxation, Visas and Brexit and engage with the media to raise the profile of inbound tourism and highlight its importance to the UK economy.

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Main Report:

Thomas K, Scott J, Stuart-Hoyle M and Thomas L (2018) *UKinbound Breaking the Language Barrier Report*. UKinbound, May.



