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

01 • INTRODUCTION AND SCOPE OF THE RESEARCH

This research is set against the background of recruitment challenges faced by the tourism and hospitality sectors, as outlined in the recent People 1st Report (2017a). 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.

Over the past two years UKinbound has lobbied extensively on the issues surrounding Brexit. For the tourism and hospitality sectors, language skills are vital. Concerns are rising amongst organisations about the attrition of the current workforce, as EU employees start to return home, exacerbating existing skills gaps. The CBI's recent feature on access to skills in a post-Brexit landscape highlights the departure of 130,000 EU nationals from the UK in the year to September – the highest number since 2008 – while 47,000 fewer than in the previous year came to live in the UK (CBI 2018). In an internal survey of UKinbound members in September 2017, 60% of respondents reported that at least a third of their workforce are currently EU nationals, with a quarter reporting that 80% or more of their workforce are EU nationals (UKinbound 2017); figures that are aligned with findings from the Tourism Alliance (Tourism Alliance 2017). According to the UKinbound member survey, the most important benefit of employing EU nationals was language skills (stated by 85% of the respondents), followed by customer service skills and specific country knowledge. When asked what barriers their members experience when recruiting a British national, 60% responded 'insufficient skills for the role' – including foreign language skills and customer service skills (UKinbound 2017).

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. This research is particularly timely and pertinent to the sector, given the trends identified by the British Council in their longitudinal study of language teaching in the UK, which highlights a long-term decline of major proportions in the study of modern foreign languages in the UK. Their most recent trends report (Tinsley and Board 2017a) highlights a one-third fall in the number of pupils taking a language at A-level in the 20 years from 1996-2016, with a decrease of three per cent in 2016 alone; whilst the number of universities offering language degrees in the UK in 2015 was 30% fewer than in 2000 (THE 2017). With little sign of an end to the decline in modern foreign language uptake in the UK, the British Council trends survey warns that the 'diminishing supply of young, home-gown linguists available to businesses … could create long-term difficulties for the country - particularly post Brexit' (Tinsley and Board 2017a: 3).

02 • METHODS AND TERMS OF REFERENCE

The focus of this research, as set out by the brief from UKinbound, was to develop an analysis of the supply-side issues constraining the ability of the UK's inbound tourism and hospitality sectors to recruit employees with business proficient language skills, particularly as the UK moves towards a post-Brexit recruitment landscape.

A two-stage approach was adopted to fulfilling the following objectives:

1. **To explore what is currently influencing education provision and attainment in language skills in the UK, focusing on current UK Government policy and post-16 language teaching in schools and the Higher Education sector.**
2. **To assess:**
   a. **the potential health of home-grown talent about to enter into career paths with a tourism/hospitality specialism and/or business proficient language skills; and**
   b. **the capacity of current UK post-16 and Higher Education provision to supply people with the business proficient language skills required by tourism/hospitality.**

The first objective was addressed through a **review of secondary data** drawn from recent reports on the policy environment surrounding language education, employment and skills gaps, and trend surveys on language provision and uptake in the UK. The aim of this evidence-based review was to identify the key factors responsible for driving current provision and attainment, and the critical challenges facing the UK if current provision and uptake of language education remain the same as we move towards a post-Brexit era. The review also followed the changing terms of the evolving 'language skills' debate, and proposes a working definition of 'business proficient language skills' for the tourism and hospitality sectors as comprising:

an advanced level of plurilingual skills defined by the ability to communicate professionally in a B2B and consumer-facing role.

The second objective was addressed through an **audit of Higher Education** provision in the UK, focusing on two contrasting areas of provision:

- **Tourism/hospitality undergraduate and postgraduate programmes** – identifying provision for language learning within the programme structure; and
- **Modern language degree programmes** – exploring the visibility of tourism/hospitality as a career pathway.

UCAS data and online university prospectus/programme outline information were audited to show current provision within the HE sector and the degree of fit between current modern language provision and the key and emerging markets for UK inbound tourism. In addition, 15 HE institutions were sampled for short telephone interviews with language Programme Directors (as key influencers) to explore the career paths of graduates with language skills, and perceptions of the tourism and hospitality sectors as destinations for language graduates. The reporting of these interviews has been anonymised and set within a wider audit of HE language department websites to explore what career options are currently being promoted to graduates who possess business proficient language skills.

Limitations: The focus of the brief was 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. A full **demand-focused** analysis, involving primary research with industry, was beyond the scope of the brief. The Evidence Review, however, covers findings from contemporary skills based reports to determine what levels of skills gap have already been reported within the sector.

As a second limitation, it should be noted that the audit of the HE sector captures **provision** only, and not **uptake**. This would have required data on participation, retention, and attainment, which were beyond the scope of this research.

03 • CONTEXT:
SKILLS AND CURRENT RECRUITMENT CHALLENGES AS THE UK MOVES TOWARDS A POST-BREXIT LANDSCAPE

3.1. Background

Tourism in the UK today is currently worth £126.9bn. It employs over 3.1m people in every local authority in the UK, and includes a huge export component of around £29.8bn annually (VisitBritain 2017:7).

In terms of competitiveness, 'the World Economic Forum ranks the UK as the 5th most competitive tourism destination, behind Spain, France, Germany and the United States' (VisitBritain 2017: 14) and the UK has been ranked third in the overall Nation Brands Index (Anholt GfK) since 2011, being in the top five for most tourism related dimensions (ibid). Despite these successes, and of significance to this study, the World Economic Forum ranks the UK as 26th for ease of finding skilled employees and the Anholt Index demonstrates that perceptions of welcome are lower than other tourism related dimensions (ibid).

The challenge of the 'skills gap' is not unique to the tourism industry, and indeed it appears to be a common UK problem, reported by nearly two-thirds of the 340 organisations surveyed in the tenth CBI *Education and Skills Survey* (CBI 2017: 8). However, 'hospitality and tourism reports one of the highest levels of skills gap of any UK sector' (People 1st, 2017a: 4), and is a sector particularly heavily reliant on overseas employment. The *Tourism Sector Deal* review sets out a vision for UK tourism to become an 'industry of choice' for UK talent, by 2030:

> *… readily able to attract, develop and retain UK talent in line with the sector's skills and growth needs; thereby significantly reducing the industry's reliance on overseas employees while delivering a world-class level of service and continuing to achieve productivity gains* (VisitBritain 2017: 44).

Nevertheless, there is also concern that the industry will continue to require access to an overseas talent pool – in particular, to fill the skills gaps relating to proficiency in languages and intercultural understanding – with post-Brexit restrictions on the freedom of movement impacting on the current supply of workers to Britain's labour market and the inbound tourism sector.

This section of the report will contextualise the research with a brief exploration of the skills required by the sector, current and predicted recruitment and retention challenges, and the concerns raised by the industry about post-Brexit impacts on the ability of the sector to access sufficient people with appropriate language skills – against a background of the education system within the UK producing a 'diminishing supply of young, home-grown linguists available to businesses' (Tinsley and Board 2017a: 3).

3.2. Recruitment challenges faced by the tourism and hospitality sectors:

The widely cited People 1st report on the ways in which 'businesses in the hospitality and tourism sector are addressing the growing challenge of how to increase their productivity and performance in order to stay competitive' (People 1st 2017a: 3) reflects on the increasingly critical **challenge of recruitment** to the sector:

Current projections suggest that, by 2024, the hospitality and tourism sector will need to find an additional 1.3m people (with 971,313 staff needed to simply replace existing staff), including 226,000 people into management positions (ibid: 5).

The study reported that 25% of hospitality and tourism businesses are reporting vacancies, demonstrating a 15% rise from the figures reported four years previously. Whilst the sectors' recruitment challenges are due in large part to acute shortages in areas such as front of house staff and chefs (People 1st 2017c: 3), it is important to note the need identified for:

- an additional 226,000 people into management positions (People 1st 2017a); and
- 'long-term employees with a wide range of "soft skills" such as excellent customer service, … and language skills in order to ensure that the UK provides world-class tourism products and experiences' (Tourism Alliance 2017).

Various analyses of the factors responsible for this shortfall indicate a complex interplay of growth in demand, set against changing demographics/population trends, falling unemployment, changing employee attitudes, and problems related to retention, often linked to seasonality and image of the sector as a career of choice (KPMG 2017; People 1st 2017c; People 1st 2017b; VisitBritain 2017). As this report will examine, this situation is further exacerbated by the **uncertainty surrounding Brexit** and the ability of the industry to recruit from a wider pool of talent within the EU in the future – particularly since, as discussed below, the demand for specific management, professional and technical skills is projected to rise throughout the economy, forcing increasing **competition with other sectors** to attract and retain talent for management roles.

The need to employ an **additional 226,000 people into managerial positions** projected for the industry reflects the wider findings of the CBI's tenth education and skills survey – based on survey responses from approximately 340 organisations – that the 'biggest growth in jobs in the years ahead is expected to be in management, professional and technical roles' (CBI 2017: 8), with 75% of the businesses surveyed expecting to have a need for more higher-level skills over the coming years (ibid:10). The British Academy's *Right Skills* report reflects on NESTA's latest study on the future of skills (Bakhshi et al 2017) with the observation that 'technological, socio-economic, geopolitical and demographic changes are already transforming the way we work. New jobs are constantly being created and existing roles evolve' (British Academy 2017:49). In identifying important skills for the future, the Right Skills report highlights the ability to thrive in a global context, alongside adaptability, entrepreneurial skills, ability to reason and thrive in a data and digitally-driven environment (British Academy 2017). This is of particular importance to the inbound tourism sector, as a 'language-active' sector where organisations use additional languages as well as English to operate their business (British Academy 2016b: 9).

3.3. Skills – A focus on language skills and intercultural awareness:

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 and Board 2017b: 32).

As stated previously (Section 1) the recent UKinbound internal member survey (UKinbound 2017) identified that the most important benefit to employing EU nationals was language skills (85% respondents), followed by customer service skills (60%) and specific country knowledge (53%). Furthermore, 60% highlighted that insufficient skills (including foreign language and customer service skills) acted as barriers to the recruitment of British nationals. Additional open responses to the survey *(final comments on employing EU nationals in your organisation)* captured more comments about the perceived value of EU nationals in relation to language and intercultural awareness:

> *'It is vital to our organisation to employ EU nationals because we need the language skills and cultural understanding of our source markets in order to promote the UK as a travel destination.'*
>
> *'We currently employ EU nationals … as they bring invaluable language and other skills to the business.'*
>
> *'If more UK nationals would have advanced language skills, we would employ them. The issue is the education system and the curriculum in the UK which need to be improved and adjusted to provide a better skill set.'*
>
> *'We employ [EU nationals] because they have travel experience and the language skills required to interact with visitors from their native countries effectively …. which is extremely rare in a UK national.'*
>
> *'We have found very few nationals apply for jobs and the ones who do lack language skills.'*
>
> *'Experienced staff that have language skills are harder to find now.'*
>
> *'They [EU nationals] usually add market and language skills, knowledge and an extra dimension and dynamics to our team.'*
>
> *'With the majority of clients coming from European client markets … language speakers with cultural affinity to [the] client and local knowledge of [the] UK are essential'* (UKinbound 2017).

With the exception of this survey by UKinbound, there is currently a lack of research on the tourism and hospitality sectors' perceptions of the value of language skills and intercultural awareness to the industry. Nevertheless, in the lead up to a post-Brexit landscape, concerns are increasingly being expressed about the industry's access to a workforce with multilingual skills. The limited research so far on the value of language skills from a tourism industry perspective may reflect the fact that, up to now, the sector has not had to rely heavily on the language skills of home-grown talent – because EU nationals, often perceived to be more 'highly-skilled than their UK-born counterparts' (KPMG 2017: 21), have been able to take up those positions.

There is, however, a body of evidence building about the value of languages and intercultural understanding for UK business, and the impact of skills gaps in this area on the productivity and competitiveness of the UK. The British Academy's *Born Global Project*, established to investigate the demand for linguistic and intercultural communication skills among employers, found:

- there is a growing and more urgent need for employees to understand diverse cultures as the world becomes more inter-connected (British Academy 2016b: 3);
- based on their survey of 410 SMEs, 70% of organisations believed that future executives will need foreign language skills and international experience (ibid:4); and
- 22% of companies surveyed said they had insufficient language capacity to meet their need. Among those without sufficient capacity, two-thirds said that misunderstandings generated by lack of employee language skills create operational problems, including 'client dissatisfaction, supply chain difficulties and problems with communication of co-workers' (ibid: 4-5).

Assessing the needs of the UK economy as a whole, the British Council *Languages for the Future* report developed a set of indicators to identify the languages the UK needs to become a 'global nation' (Tinsley and Board 2017b). The results of this latest review suggest that the five languages with the greatest potential to contribute to the UK's post-Brexit strategic interests are French, German and Spanish – already widely taught in UK schools – plus Arabic and Mandarin (ibid: 32). These findings are backed up by the results of the CBI/*Pearson Education and Skills Survey* 2017 (CBI 2017: 34). A striking feature of the report, which might be a cause for concern for the tourism industry, is that, despite tourism's contribution to the UK economy, it does not feature in the British Council report as an economic indicator, in terms of language skills required to do business – although it does feature as a cultural indicator of language requirements. Later in this report (section 5.1), the

uptake of these languages by UK school leavers at A-level will be assessed and discussed in the context of the key inbound tourism markets.

When considering the value of foreign modern languages to business, it is important to note that key reports focus not just on linguistic skills, but on **enhanced intercultural awareness and understanding.** In particular, languages and intercultural knowledge and understanding are integral to a sector striving to build strong international markets for UK tourism. As we discuss in a later section of this report, a shift is occurring in the understanding of 'linguistic competence', from the old 'multilingual' model of the technical 'mastery' of individual languages, to a model of **'plurilingualism'** that emphasises the capacity to move across linguistic and cultural boundaries, based on the development of 'cultural empathy' and a 'linguistic repertory, in which all linguistic abilities have a place' (Council of Europe 2001: 5). The plurilingual model emphasises the importance of a 'lifelong' approach to the development of language competence, assisted by a strong enabling environment, not only in educational institutions, but in business organisations and in society more generally. In the context of the current research, the 'business proficient language skills' required by the inbound sector entail not only an advanced level of proficiency allowing employees to communicate effectively at a B2B level, but also a level of plurilingualism and intercultural awareness that will enable the UK to improve its 'soft skills' and raise its reputation for welcome. We therefore propose a working definition of 'business proficient language skills for the tourism sector' as comprising **an advanced level of plurilingual language skills defined by the ability to communicate professionally in a B2B and consumer-facing role.**

3.4. Post-Brexit Britain – Access to plurilingual employees

As the previous section has highlighted, the uncertainty of the Brexit negotiations has given rise to increasing recognition of the value of, and need for, plurilingual staff in the tourism/hospitality sectors. The situation is currently in flux, and until the findings of key studies such as the Migration Advisory Committee (MAC) inquiry are finalised, the evidence base is incomplete.[1] In terms of the current research, it is important to explore what is known about the tourism sector's reliance on EU workers, and the concerns being raised by industry about their ability to access a workforce that they regard highly in terms of language skills. The House of Commons' second report on *the potential impact of Brexit on the creative industries, tourism and the digital single market* was produced on the assumption that 'the UK will cease to be a formal member of the European Union and, in doing so – after a transition period or not – will also cease formally to be a member of the Single Market and Customs Union' (House of Commons 2018: 5). Whilst the precise nature of the arrangements that will replace the Single Market and Customs Union is not yet known, this study has been written from the assumption that Brexit will bring with it restrictions in freedom of movement to future workers, and will significantly change the existing capacity of UK businesses to recruit EU workers. From this broad stance, the final part of this section will briefly review the evidence from key reports and consultations linked to the Brexit negotiations reflecting the concerns expressed by the industry. This will set the scene for the primary research findings on the availability of home-grown talent with appropriate linguistic skills and intercultural understanding (reported in section 5 of this report).

Recent key reports (House of Commons 2018, KPMG 2017, People 1st 2017a) show wide variations in estimates for the percentage reliance of the tourism and hospitality sector on EU workers. It is clear that significant regional variations exist, and the concentration of EU workers varies across roles (KPMG 2017). There is general agreement that **EU workers are a 'critical labour pool'** (People 1st 2017c: 3) and that the tourism and hospitality sectors place significant reliance on this labour pool, compared to other UK sectors. It is also important to highlight the findings from the People 1st (2017c) report on *Migrant workers in the hospitality and tourism sector* and the potential impact of labour restrictions that, whilst overseas workers who come from EU countries are fairly evenly balanced with those who come from outside the EU (48% and 52% respectively), the period of 2011-2016 has seen a significant increase in the number of workers coming from within the EU (see Figure 1 page 9).

1. MAC is an independent public body that has been commissioned by the Home Office to report on the impact on the UK labour market of the UK's exit from the EU, and how the UK's immigration system should be aligned with a modern industrial strategy. The government has set a deadline of September 2018 to report back. MAC published an interim report in March 2018 (c.f. MAC 2018)

Figure 1: Increase in migrant labour in the hospitality and tourism sector (2011-2016)

Source: People 1st (2017c: 2)

The *Tourism Sector Deal* 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' (VisitBritain 2017:43). This view is reinforced by the findings of the House of Commons Digital, Media and Sport Committee that 'across all sectors [creative industries, tourism and digital], witnesses highlighted the importance of retaining their EU staff and maintaining access to talent and future workers' (House of Commons 2018: 9). In their written evidence to the committee, Hilton Hotels stated:

EU nationals work in a wide range of roles and are an important part of our skilled UK workforce. They bring valuable language skills and international experience, helping us to welcome European guests who make up 63% of inbound holidaymakers to Britain. An international perspective is also vital as we welcome visitors from around the world. Our role as ambassadors for the UK is now of strategic importance as we deliver the GREAT welcome to leisure and business travellers. We need to ensure that the British hospitality and tourism offer is able to serve this demand in the future (Hilton 2016).

These estimates cover a broad spectrum of EU workers employed in the sector, and there are significant variations across roles: for example, the KPMG analysis of the British Hospitality Association survey estimates that 75.3% of waiters and waitresses is made up of EU nationals, in comparison to 13.5% of hotel and accommodation managers and proprietors (KPMG 2017). UKinbound's written evidence to the Parliamentary Committee provided further confirmation of the diversity of roles:

30% of our members' employees are EU migrants and many business owners have said that the loss of this highly valued workforce would be a body blow to the industry. EU migrants are employed at all levels of the industry… In many cases, their language skills are critical to an industry whose priority it is to welcome inbound visitors. This applies not only to hotel staff offering front-line service to customers, but also to operational and contractual staff building business with tour operators across the EU (UKinbound 2016).

The current uncertainty felt by EU nationals working in the sector over their future in the UK appears to have precipitated a crisis of retention in the industry:

Despite assurance over the rights of the 3 million EU workers that live and work in the UK … it is as much about perceptions around being wanted, as it is about job security. According to the latest immigration statistics, 130,000 EU nationals chose to leave in the year to September – the highest number since 2008 – while 47,000 fewer came to live in the UK than the previous year (CBI 2018).

The employment of EU nationals in such numbers highlights 'the dearth of language skills available to tourism and hospitality businesses' (House of Commons 2018: 14). As the Migration Advisory Committee's interim report emphasises, employers do not deliberately set out to fill vacancies with migrant workers, but they 'employ EEA migrants when they are the best or, sometimes, the only available candidates' (MAC 2018:5).

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 evaluate the **potential of home-grown talent to meet the needs of the future** inbound tourism industry. As the CBI/Pearson survey points out, education and skills will be critical factors in the navigation of these changing times (CBI 2017). In the next section of this research we explore the evidence concerning the key policies and trends impacting on the education and skills environment.

04 • A REVIEW OF THE KEY INFLUENCES IMPACTING UPON THE SUPPLY OF 'HOME-GROWN' TALENT AND HOW THIS POLICY LANDSCAPE IS SHAPING CURRENT TRENDS, PROVISION AND ATTAINMENT.

This section presents the findings from the evidence review on the current political and educational landscape, which is the setting for language skills education provision and attainment of home-grown talent.

This evidence-based review focuses on identifying the key factors responsible for driving current provision and attainment, and critical challenges the UK may face if current provision and uptake of language education remains the same as we move towards a post-Brexit era. A key area of interest is the impact of this landscape on post-16 language uptake, as students studying modern languages at A-level make up a large part of the potential talent pool which may go on to develop high level language skills at University.

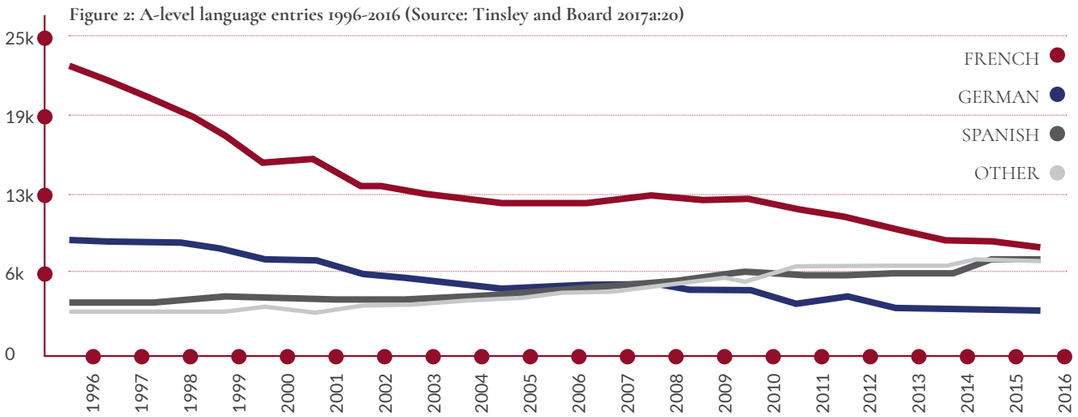
4.1. The current picture

Language provision and uptake in the UK has been on the decline throughout the 21st century, but the picture is a complex one. UCAS figures for 2015 quoted in Times Higher Education 2017 showed the number of universities offering language degrees in the UK to be 30% fewer than in 2000, with a concentration of language departments in Russell Group universities (THE 2017). The trend reflects the knock-on effects of what the British Council, in its most recent language trends survey (Tinsley and Board 2017a), identifies as low levels of participation and achievement in languages at GCSE, and a decline 'of disastrous proportions' in numbers taking languages at A-level. This overall national decline masks a number of significant areas of inequality, based on 'regional and socio-economic factors, gender and type of school' (ibid: 3). The British Council's *Language Trends Survey*, for example, highlights the wide (and growing) disparity between the 65% of pupils taking a language to GCSE in Inner London, and the 43% in the North-East, falling to 28% in Middlesborough (ibid: 4). Across England, language take up is proportionately higher within high performing schools, with a decline in schools in areas of high socio-economic deprivation (Leadership Foundation 2016). Independent schools represent a disproportionate number of A-level language entries at 32%, whilst accounting for only 18% of the total post-16 pupil cohort; and A-level entries for languages are heavily skewed towards female candidates (64%).

Against this background, the British Council identifies further significant declines in the numbers of **'dual linguists'** at GCSE, with 45% of independent sector and 37% of state sector schools reporting a drop in numbers taking more than one language. This has knock on effects for A-level and university study, and, as the report highlights, implications for the future supply of language teachers in schools, many of whom are expected to offer more than one language. There is also a shift in the popularity of particular languages, with Spanish overtaking German (which is now taught at Key Stage 3 by fewer than half of state schools) (Tinsley and Board 2017a).

Trends in **A-level entrants** show a one-third fall in the number of pupils taking a language at A-level in the 20 years from 1996-2016 (Figure 2 below), with a decrease of 3% in 2016 alone (ibid). The same 20 year period saw a major shift away from French and German, which in 1996 accounted for more than 80% of A-level candidates, towards Spanish and other languages, which now represent more than half of A-level language candidates. However, with Spanish and other languages also showing a slight decline in 2016, the survey concludes that 'post-16 language study [is] one of the most pressing concerns to be addressed' (ibid: 4). The downward trend for French and German continued in the most recent figures for 2017, with a 2.1% fall in entrants for French, and 4.7% for German, against a background of a 1% decline in A-level entrants for modern foreign languages overall. Entrants for Spanish, on the other hand, increased by 1.7% (British Council 2017).

Figure 2: A-level language entries 1996-2016 (Source: Tinsley and Board 2017a:20)



Whilst single honour and double honour language student numbers show continued decline, falling by 46% between 2010-11 and 2013-14 (compared with a fall of 14% for HE entrants across all subjects over the same period (Leadership Foundation 2016)), UCAS figures for 2015 show that 80% of language students at university were taking languages in combination with other subjects, such as humanities, social science (especially business studies) or STEM[2] subjects (THE 2017). Enrolments to IWLP[3] courses, enabling students to study modern language modules alongside their degree courses, more than doubled in a decade, and figures for 2016 published by the University Council of Modern Languages and the Association of University Language Centres indicate in excess of 60,000 enrolments nationally (Leadership Foundation 2016). This suggests that students are recognising the value of language competence as an adjunct to other areas of knowledge and skill.

4.2. How did we get here?

In 2002 the Labour Government announced an end to the requirement for a foreign language to be studied at **Key Stage 4 and GCSE**, leading to a fall in the take up of languages from 76% in 2002 to 44% in 2008 (Leadership Foundation 2016: 15). The decline subsequently slowed down and has stabilised at about 50% of the pupil cohort. A decision taken in the same year to improve language take-up in **primary schools** saw a rise at Key Stage 2 from 22% of pupils learning a language to 99% in 2014. However, a number of complicating factors has meant that the increase in primary school numbers has not fed through to increase demand for language learning at secondary school level.

One of the principal challenges cited by modern language teachers is the reputation of languages for being more **difficult** subjects, subject to inconsistent and overly rigorous marking and less likely to deliver the top grades pupils need for entry to the university of their choice (Leadership Foundation 2016; Garraghan 2015). Competition with native speakers is regarded as potentially disadvantaging non-native speaker language learners as it pushes grade boundaries up (Rudgard 2017). The perception of languages as an **'elitist'** subject – increasingly seen in many schools as only being for the 'brightest' pupils, leading to the exclusion of pupils seen as less likely to achieve higher grades – has also been cited as a challenge (Garraghan 2015). Whilst the inclusion of a foreign language in the English Baccalaureate (EBacc)[4] is widely viewed as a positive step, there are also fears that the requirement for pupils to achieve a good grade in a language will prove a major obstacle to pupil success in the EBacc over all (Tinsley and Board 2017a). There are signs that the majority of state schools are responding to changes in GCSE and A-level specifications introduced in 2016/17 by limiting language study to a single language, and reducing Key Stage 3 to two years to create a three year GCSE course. The effect of this is that pupils who do not choose a language as one of their GCSE options at the end of Year 8 miss one-third of their statutory language time at Key Stage 3 (ibid). The move by many schools from four to three A-levels and the withdrawal of AS languages courses (in nearly 25% of independent schools and 15% of state schools) may further weaken language uptake at A-level (ibid).

Resources is another significant issue, which has widened the gaps between independent and state sector language provision. In terms of access to **language assistants,** 73% of independent schools currently host a language assistant, compared with just 33% of state schools (Tinsley and Board 2017a). The *British Council Language Trends Survey* also notes that guidelines relating to child safety are proving an obstacle to many schools' longstanding **international visits and exchange programmes.** Both independent and state sector schools report increasing pressure on **timetabling** of languages, which is eroding the contact time secondary and primary school teachers have with their pupils – down to just one hour per week devoted to languages at Key Stage 2. The need for more **stimulating and engaging content and modes of delivery** to motivate and hold the interest of students, and school students' general ***lack of confidence in their speaking ability***, are also cited as challenges to language teaching and learning (THE 2017).

Finally, mention should be made of the perceived **lack of clarity regarding routes to employment** for modern linguists. Whilst there is frequent reference in reports and policy papers to the recognition amongst business leaders of the 'growing and unmet need' for 'modern language skills', including intercultural communication skills, the nature of these skills and the kinds of career paths open to language graduates is seldom specified, beyond that of the diplomatic service, armed forces, and interpreters and translators into English (HEFCE 2011; Leadership Foundation 2016; British Academy 2016a). The British Academy's *Born Global* report points out that 60% of UK employment is in the SME, micro and sole trader sectors, but it is the larger companies who are more likely to have functions requiring higher level language skills. Whilst 'a focus on foreign language skills is not seen by many businesses as a top priority area for action in education, their practical value is increasingly recognised' (British Academy 2016a: 9; Tinsley and Board 2017a). However, according to research by the CBI/Pearson, employer satisfaction with school/college leavers' foreign language skills declined sharply in 2017, standing at 34% compared to 42% in 2016 (Tinsley and Board 2017a). Research by Adzuna based on a survey of over 1,000,000 live job postings on its website, requiring specific language competences, found the greatest demand, and the highest paid jobs, were for German (Brinded 2016) – this despite the current decline in numbers studying German at school and university. The British Council's *Languages for the Future* Report 2017, whilst confirming a continuing and growing demand for 'traditional' (German, French, Spanish) and 'emerging' (Mandarin, Arabic) language skills (alongside an important role for languages such as Italian, Russian, Portuguese, and Turkish), highlights the need for better communication and promotion of the opportunities for linguists, alongside a need for **'Government and business organisation to provide better advice to companies on using and managing language skills, particularly as it relates to achieving export-led growth'** (Tinsley and Board 2017b: 33).

2. Science, Technology, Engineering and Maths
3. Institution Wide Language Provision
4. The performance measure for schools introduced in 2012, which the government eventually expects 90% of pupils to take.

4.3. The picture in Europe

The UK is not alone in experiencing a crisis in language learning, although problems of monolingualism seem particularly entrenched in the UK compared to other European experience. In March 2002, the European Heads of State or Government meeting in Barcelona agreed the policy goal of ensuring that **all** EU pupils learn at **least two foreign languages** from an early age (EUR-Lex nd). In 2012, the European Commission conducted its *First European Survey on Language Competences*, with the aim of establishing a 'European Indicator of Language Competence' as part of the move towards the Barcelona policy objective. Using the framework developed in the widely adopted *Common European Framework of Reference for Languages: Learning, Teaching, and Assessment* (Council of Europe 2001), which defines six levels of functional competence, from 'basic user' at A1-A2, to 'independent user' (B1-B2) and 'advanced user' (C1-C2), the Survey examined levels of language proficiency amongst 15 year old school pupils in 14 European countries, including UK-England, and found 'an overall low level of competences in both first and second foreign languages tested' (European Commission 2012: 4). The level of 'independent user' was achieved by only 42% of the students tested in the first foreign language, and by only 25% in the second foreign language, with a large number of pupils (14% for the first language, 20% for the second) not even achieving the level of 'basic user'.

The Survey showed wide variations across the countries of Europe. For the first foreign language, the proportion of students reaching the level of 'independent user' varies from 82% in Malta and Sweden (English) to 14% in France (English) and 9% in England (French). For the second foreign language (not English) the level of 'independent user' is reached by 4% in Sweden (Spanish) and 6% in Poland (German) compared to 48% in the Netherlands (German). Significant factors in this variation include the degree of official multilingualism in the country (e.g. in Belgium and Luxembourg, which operate with two and three official languages respectively), and the number of years of language learning, with **earlier onset** positively related to higher proficiency in the foreign languages tested, alongside the learning of a **larger number of foreign languages**, and of ancient languages. English emerged as the language pupils are most likely to master. Amongst the reasons proposed for this are the perception that English is the most 'useful' language, and the easiest to learn. Pupils are more likely to be exposed to English from an early age, both in formal school settings, and informally from traditional and new media. In addition, **parents' foreign language** knowledge is more likely also to extend to English, although this is the case in some countries more than others.

The EU's Barcelona policy agenda focuses on the need for EU citizens to be competent in at least two foreign languages. However, for some countries, this represents a decline in plurilingualism. Evidence from Denmark, for example, suggests that economic austerity cuts in education budgets and policy reforms linking subjects to labour market requirements meant that in 2015 only 4% of pupils left school with three languages, compared to 33% in 2007, with less popular languages no longer being made available (THE 2017; Andersen 2017). Responding to this decline, the Danish government announced a new languages strategy in December 2017, establishing a new two-pole **national languages centre**, located in the east and west of the country, supporting municipalities and institutions in developing **local language strategies**, and placing greater emphasis on **integrating foreign languages into other subjects** (Andersen 2017).

Finally, one of the key lessons of the *European Survey on Language Competences* highlights the importance of policies creating a broader 'language-friendly living and learning environment, where different languages are heard and seen, where speakers of all languages feel welcome and language learning is encouraged' (European Commission 2012: 12), creating informal language learning opportunities and spreading an expectation of 'plurilingualism' throughout society.[5]

4.4. Interventions, initiatives and policy

In 2011, the new UK Coalition Government withdrew support from the National Languages Strategy (established in 2003) and sought to devolve the majority of funding for languages to schools and universities. Since then, there has been no overarching languages framework in England (Leadership Foundation 2016). HEFCE[6] stepped into the gap with a series of initiatives that targeted modern foreign languages, along with STEM subjects, as *Strategically Important and Vulnerable Subjects* (c.f. HEFCE 2011). A two-phase *Routes into Language* programme, launched in 2006, brought together a coalition of university foreign language departments around the country, under the leadership of the University of Southampton, to build an outreach programme aimed at raising the demand for language learning in schools. With funding of over £10.5m from HEFCE over ten years, the *Routes into Language* programme achieved notable successes around the country, establishing the need and the model for a consistent role to be played in raising and maintaining demand for language learning in schools. Funding for the programme ended in 2016, and with the closure of HEFCE in March 2018, the future of the programme is in doubt. Whilst the nine regional university consortia maintain a legacy structure for the programme, a sustainable funding strategy for the future is still to be found (Leadership Foundation 2016).

Another ambitious initiative is the *Mandarin Excellence Programme*, which, recognising the importance of Mandarin Chinese for the UK's future, aims to get 5,000 secondary school pupils fluent in the language by 2020, and train a cohort of at least 100 teachers (UCL nd). The programme is being delivered by the Institute of Education of University College London, in partnership with the British Council, with £10m of funding over four years from the Department for Education. At roughly the half-way point of the programme's delivery, concerns are being raised about the achievability of the ambitious goals, and about the long-term sustainability of the programme (Busby 2017).

University departments and modern language associations – such as the British Council, the Association for Language Learning, the University Council of Modern Languages, and the British Academy – continue to contribute to the debate with policy research and practical initiatives, and in 2017 OFQUAL responded to representations about the skewing of modern foreign language exam grades by 'native speakers' with a one-off adjustment to grades and an undertaking to redress the skewing through a greater focus on grammar in the syllabus (Staufenberg 2017). The reconvening of the All Party Parliamentary Group on Modern Languages in July 2017 sought to move modern language issues up the national agenda, with a *Manifesto for Languages* advancing policy proposals to make high quality language learning available to all children throughout the UK from age seven, support university language departments, and actively encourage business and employers to 'get involved in tackling the crisis through a tax break for companies investing in language training' (British Council nd).

There is a general consensus in the research and policy papers reviewed that, despite the value and successes of individual project-based initiatives, a system wide, coordinated approach is what is required to address the modern foreign languages crisis in the UK. The *British Council Language Trends Survey* points to the need for 'proactive leadership at national level in order to realise the vision and strategy for languages which is apparent in recent policy changes', alongside policies and initiatives that are 'appropriately funded' (Tinsley and Board 2017a: 8). The Cambridge Public Policy Strategic Research Initiative on *The Value of Languages* also highlights the need for a coordinated, UK wide languages strategy, with high level, high profile national leadership, including the creation of a role similar to that of Chief Government Scientist, to coordinate external campaigns aimed at achieving cultural change towards the support of language learning and 'plurilingualism', in organisations and society as a whole (Cambridge Public Policy SRI 2015). Finally, a number of studies, including the British Council's *Languages for the Future Report*, highlight the desirability of UK government negotiators in EU exit negotiations protecting and prioritising education exchange programmes and guaranteeing their continuation, either via the UK retaining full membership of the Erasmus programme, or, if this is not possible, seeking to replicate its benefits through equivalent bilateral arrangements (Tinsley and Board 2017b).

The next section of the report will present the findings from the audit concentrating on Higher Education provision within the UK.

5. See section 3.3 above
6. Higher Education Funding Council for England

05 • A REVIEW OF THE POTENTIAL HEALTH OF THE CURRENT TALENT POOL, READY TO ENTER EMPLOYMENT IN THE NEXT FEW YEARS AND WITH THE GREATEST POTENTIAL TO POSSESS BUSINESS PROFICIENT LANGUAGE SKILLS

This section will set out the results of the primary research designed to audit the current talent pool of home-grown talent about to move into career pathways, with the potential to possess business proficient/advanced level language skills. This will provide:

1. an insight into the potential health of home-grown talent about to enter into career paths, with a tourism/hospitality specialism and/or business proficient language skills; and

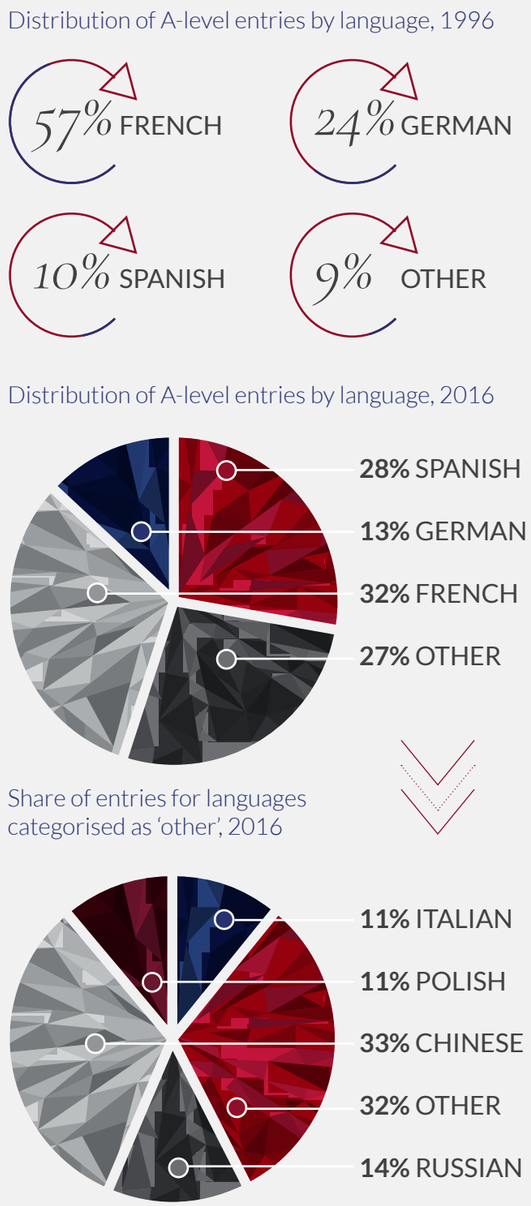
2. an indication of the capacity of current UK post-16 and Higher Education in the UK to supply people with the skills required by the inbound tourism/hospitality sector, as outlined in section 3.

5.1. Post-16 Secondary Education:

The previous section (Section 4) has presented data from the longitudinal studies of languages reported annually by the British Council, using DfE data and widely cited across the sector (see Figure 2). Although the 2018 Trends Report (for 2017 data) is yet to be published, the British Council reports provide a robust analysis of the A-level entry figures for a full twenty-year period, from 1996-2016. Section 4.1 highlights a one-third fall in the number of pupils taking a language at A-level in the past two decades, and sets this figure within the wider context of the policy landscape and the factors shaping these trends in uptake and attainment in modern languages[7]. A British Council press release commenting on the grades attained by A-level students in 2017 notes that the number of students gaining A* and A grades increased by 1.7% in French, 1.8% in German, and 2.5% in Spanish (British Council 2017).

Trends have also been measured across the different languages on offer at post-16 level. French has seen a particularly steep decline in A-level entries over this period from 22.7k (1996) to 8.5k (2016), as has German from 9.3k to 3.4k. In contrast, Spanish has experienced a rising number of entrants from 4.1k to 7.5k, along with 'other' languages which have become more prominent within the entry figures (Tinsley and Board 2017a: 20). The distribution of A-level entries can be seen by language for 2016 below and are benchmarked against 1996 data (Figure 3):

Figure 3: Distribution of A-level entries by language (1996 and 2016)



Source: data cited in British Council (Tinsley and Board 2017a:20) Language Trends 2016/17 Report

7. British Council comments on 2017 figures in advance of publication of the 2017 Trends Survey suggest a continued downward trend. See Section 4.1 above.

These figures show that French now accounts for only 32% of A-level language entries, with Spanish increasingly close to matching this uptake (28%) and German only accounting for 13% of entries. Between 1996 and 2016, therefore, the dominance of French and German has declined substantially. The range of languages represented by the data for the 'other' category has also increased, from 9% in 1996 to 27% in 2016. Chinese, representing a key growth market for UK inbound tourism, accounts for around one-third (33%) of the 'Other' category, and Italian only 11%.

When these figures for A-level language uptake are considered against the ranking of inbound visitor markets (as measured by visitor numbers) and by recent visitor trends (indicated by % increase in visits from France, Germany, Spain, Italy, GCC (Gulf Cooperation Council[8]) and China) some interesting findings emerge. The most recent annual figures from VisitBritain (nd) provide a useful benchmark from which to assess potential needs of the inbound tourism sector, against the proportion of post-16 students taking A-levels in these languages in 2016. Based on the assumption that this is the cohort most likely to have entered Higher Education in Sept 2016, and, most likely to be the pool from which modern language graduates will be drawn in 2019 (for 3-year degree programmes) and 2020 (for 4-year degree programmes), the infographic (Figure 4) demonstrates where there could be potential mismatches between demand and supply – with increasing visitor markets and declining modern language learning at post-16 level. Additionally, visitor markets with high growth potential (GCC and China) are only met by small levels of A-level uptake.

5.2. Higher Education Provision:

Whilst modern language A-Level entry trends and attainment give a measure of the strength and sustainability of the potential home-grown talent pool, the focus of this study now shifts to an audit of Higher Education trends, to understand the evolving situation regarding advanced level language acquisition, and its ability to create a workforce with the competence to apply language skills in a professional capacity in both a B2B and consumer facing role. Modern languages feature in a wide variety of undergraduate and postgraduate degrees. For the purposes of this study, two contrasting areas of provision have been selected with a view to examining current Higher Education provision which may lead to careers in tourism and hospitality with a relevant language competence. This will allow the study to assess the potential health of home-gown talent about to enter onto career paths, with a tourism/hospitality specialism and/or business proficient language skills. The following analysis will focus on:

- Tourism and hospitality related undergraduate and postgraduate programmes in the UK, to examine language provision within the programme structure; and
- Modern language degrees provided by UK Higher Education institutions, to explore the presence and visibility of tourism/hospitality as a career pathway.

Figure 4: Trends in UKinbound markets against languages studied at A-level (sources: data cited in VisitBritain (nd) and Tinsley and Board, 2017a)

8. GCC – Gulf Cooperation Council is reported as a single market by VisitBritain (United Arab Emirates, Saudi Arabia, Qatar, Oman, Kuwait, Bahrain)

5.2.1. Tourism and Hospitality Programmes with languages

An audit of undergraduate and postgraduate tourism and hospitality programmes in the UK was carried out to find out how many incorporate a language module (compulsory or optional), using UCAS data and online university prospectus/ programme outline information:

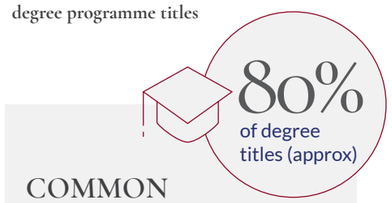
UNDERGRADUATE PROVISION:

There are 78 Institutions of Higher Education in the UK offering 196 undergraduate degree programmes with tourism and/or hospitality in the title for the academic year 2018-2019 (Figure 5). This compares to 114 institutions offering tourism related programmes in 2013, 117 in 2009 and 122 in 2006 (ATHE 2012[9]). Of the 78 current institutions, 1 is in Northern Ireland, 7 in Wales, 8 in Scotland and the remaining 62 (87%) in England

In terms of language provision within the validated programmes, of the 78 **institutions**, 25 (32%) offer a language as part of their tourism and/or hospitality curriculum. When examined at a **programme** level, research in 2001, which focused upon factors influencing the development of the tourism undergraduate curriculum in the UK, found that, in the academic year 1997-98, of the 66 programmes offered at undergraduate level, 13 (20%) included a foreign language (Stuart 2001). The current provision shows that twenty years later there has been a slight increase in the inclusion of foreign languages, as 56 (29%) of the 196 programmes currently offered include a foreign language in the curriculum.

Languages currently offered: From the 56 tourism and/or hospitality undergraduate programmes which offer a language (as optional or compulsory) Spanish, closely followed by French, is the most common language offered. Mandarin, Italian and Arabic are less commonly offered across the programmes (Figure 6).

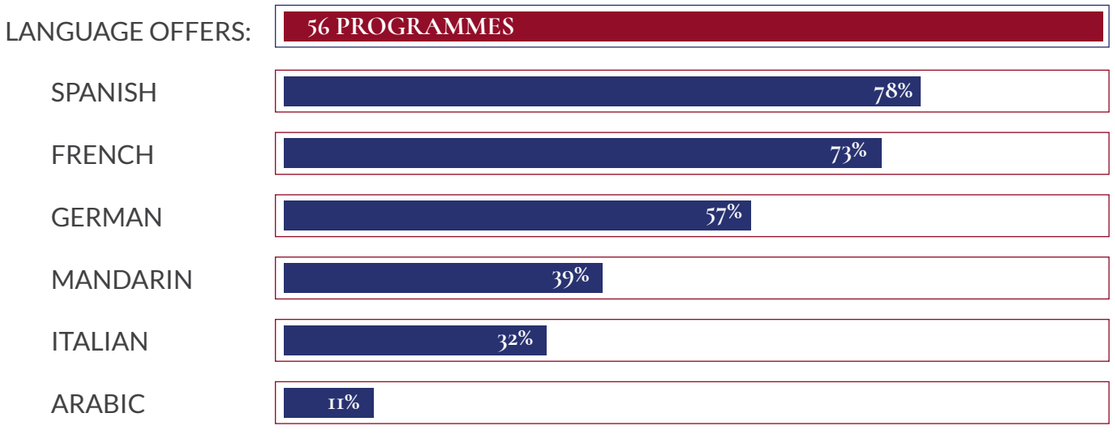
Figure 5: Exemplar common undergraduate tourism and/or hospitality degree programme titles



COMMON UNDERGRADUATE PROGRAMME TITLES:

- Tourism Management
- Hospitality Management
- Tourism and Hospitality Management
- International Tourism/ Hospitality Management
- International Tourism and Hospitality Management

Figure 6: Languages offered across the tourism and/hospitality undergraduate programmes which include a language module (optional or compulsory).



Where and how the language element is offered: of the 25 (32%) institutions which offer a language as part of their tourism/hospitality programmes, only 5 (19%) offer languages as a compulsory element of the degree and the remaining 20 (81%) institutions offer languages as an optional aspect of the curriculum.

The majority (84%) of these institutions offer the language throughout the entire degree, however 4 (16%) include provision in certain years; more often than not in years 3 and 4

9. Number of institutions offering Tourism related degrees, not Hospitality.

It is important to note, however, that these figures only give an indication of provision, not engagement. To assess uptake more detailed auditing beyond the scope of this study would need to look more widely at:

- the uptake of modern language modules (for optional modules);
- recruitment and retention data of individual programmes; and
- additional provision in terms of combined programmes, for example Tourism and French as a combined honours degree.

Additional opportunities - Study Abroad/international provision: The evidence review highlighted the increasing trend for students to enrol in a modern language alongside their degree programme (through IWLP, which has doubled in a decade – see section 4.2 above) or take up the opportunities within programmes for a study abroad element. These types of opportunities provide the 78 institutions with alternative ways to augment their tourism and hospitality degrees with an international dimension. 43 (55%) of the 78 institutions offering tourism or hospitality single honours programmes offer students an international/study abroad option; via opportunities such as:

- Erasmus Exchange programmes (8 institutions- 10%))
- Informal exchange arrangements (34 institutions – 44%)
- Go Global Programme (study in China, Vietnam, India, Malaysia or New York) (1 institution- 1.2%)

Destinations for placements include Cyprus, Tenerife and Malaga. Where the tourism programme has a named language in the title, the placements are offered specifically in the country linked to the language being studied.

Although the uptake of opportunities such as Erasmus programmes is more likely to be by a small proportion of students each year from each degree programme, this can be seen as an important aspect of provision in contemporary Higher Education seeking to fulfil an internationalisation agenda.

POSTGRADUATE PROVISION:

The audit identified 45 Higher Education institutions in the UK offering 87 postgraduate taught degree programmes with tourism and/or hospitality in the title in 2018. Of the 45 institutions, 1 is in Northern Ireland, 2 in the Republic of Ireland, 1 in Wales, 5 in Scotland and the remaining 36 (80%) in England. The range of programme titles shows more variation than the undergraduate title, however, approximately 50% still have the titles as displayed in Figure 5 (showing common undergraduate titles).

Where and how the language element is offered: Only five programmes across three separate institutions offer languages as part of their validated programmes, in all five cases as optional modules:

- one programme is non-specific in terms of the languages being offered
- one offers French, German, Spanish, Arabic, Mandarin, Japanese, Gaelic and British Sign Language
- the remaining three (all from the same institutions) offer French, German, Spanish, Mandarin and Japanese.

The notable omission from this list is Italian, not obviously offered as part of any postgraduate tourism/hospitality programme.

International/Study Abroad provision: As with the undergraduate programmes, more institutions offer international opportunities (not always associated with language acquisition), than offer specific language options. Ten of the 45 institutions (22%) offer students an international/ study abroad option; including:

- research/work placements abroad (3 institutions – 7%)
- informal exchange arrangements (4 institutions – 9%)
- international fieldtrips (2 institutions – 4%)
- Go Global programme (1 institution – 2%)

Exchanges and overseas-based modules feature in countries such as Sweden, Malta, France, Greece and Bulgaria. As with undergraduate provision, therefore, these types of opportunities are incorporated far more widely than modern languages modules.

Figure 7 (over page) summarises the findings of this section of the audit in infographic format, emphasising that the proportion of tourism/hospitality programmes offering languages as an integral part of the validated degree is quite low for undergraduate programmes and extremely low for postgraduate programmes. International opportunities, not necessarily linked to language competence, are, however, far more widely offered.

Figure 7: Language provision within undergraduate and postgraduate Tourism and/or Hospitality programmes in the UK

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.

LANGUAGE OFFERS

- 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

LANGUAGE OFFERS

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

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

Source: audit evidence drawn from UCAS (www.ucas.com) and individual HEI websites

5.2.2. Modern language provision and perceptions of tourism/hospitality as destinations for language graduates

This section explores whether and how modern language degree programmes promote tourism and hospitality as a potential career path. It is based on an analysis of modern language programme content on university webpages, and on 15 interviews undertaken with Programme Directors from a variety of UK universities which offer modern language degree programmes.

Unlike the audit of languages within tourism and hospitality programmes (section 5.2.1) which consisted of a full audit of the number of programmes within each institution, the focus of the investigation into modern language programmes was not intended to identify the scale of modern language provision across the UK. The remit of this examination was instead to identify how tourism and/or hospitality are positioned as a career choice.

Although it is beyond the scope of the research to provide a full quantitative audit of modern language degree provision, the data which has formed the evidence base for this section is drawn from a broad sample of 43 Higher Education institutions, covering a cross-section of universities, including Russell Group, non-Russell Group and Post-92 Universities, using the search criterion[10] of 'UK institutions which offer single honours modern language degree programmes'. This search captured a range of institutions offering a wide variety of modern language programmes in addition to single honours, including double language honours and combined degrees. The sample of 43 institutions therefore provides a solid base from which to develop the analysis, enabling the audit to reflect the range of modern language degree programmes on offer within institutions, which offer students a wide choice in languages and an additional discipline (Figure 8 - page 19).

10. UCAS website for 2018-2019 entry

Figure 8: Exemplar modern language degree programmes (Russell Group, non-Russell group, and Post-92)

RUSSELL GROUP UNIVERSITY

- Language, Culture and Communication
- Modern Languages
- Modern Languages and Linguistics
- Linguistics with Arabic, Italian, German, Japanese, Russian, Portuguese, Spanish, Chinese and French
- Modern Languages and Economics

NON-RUSSELL GROUP UNIVERSITY

- Modern Languages (French, German, Italian, Spanish, Japanese, Portuguese)
- Modern language with International Experience
- Intercultural Communication and/with language
- Language and/with management
- Language and/with Global Politics
- Language and/with International Law

POST-92 UNIVERSITY

- French and (Spanish or German)
- German and (Spanish, Mandarin, or French)
- French and Linguistics
- Mandarin Chinese and Linguistics
- Spanish and Mandarin Chinese
- Spanish and European Studies
- International Business (with Spanish)
- Mandarin Chinese and Global Studies

The Programme Director interviews identified some key changes in the modern language degree provision and curricula over the last five years, namely increases in combined degrees, and a diversification in the range of languages offered, set against a worrying decline in student numbers. These changes have emerged in parallel with increasing pressure felt by Programme Directors to emphasise to their students the availability of as broad a range of career paths as possible. According to the Programme Directors, the diversification of languages is largely due to changing market demand, whilst the demand for 'traditional' languages (i.e. French and German) has been declining. A review of university webpages reveals many universities now offer languages such as Arabic, Mandarin and Korean. The increased uptake of combined degrees reinforces the findings from the Evidence Review (section 4.1) highlighting the 2015 figures from UCAS, which showed that 80% of language students studying degree level programmes were taking languages in combination with other subjects (Figure 9).

Figure 9: Examples of combined programmes with modern languages across UK institutions

COMBINED WITH TRANSLATION/ LINGUISTICS

- Modern Languages with Translations
- Modern Languages, Translation and Interpreting
- Modern languages and linguistics
- Modern Languages and Translation Studies

COMBINED WITH BUSINESS

- Modern Languages with Business and Management
- Language and/with Management
- International Management and modern languages
- Modern Languages for International Business
- Modern languages with Management Studies
- Languages with Intercultural Communication with Marketing Management
- French and Management
- Modern Languages and Economics

COMBINED WITH INTERNATIONAL STUDIES

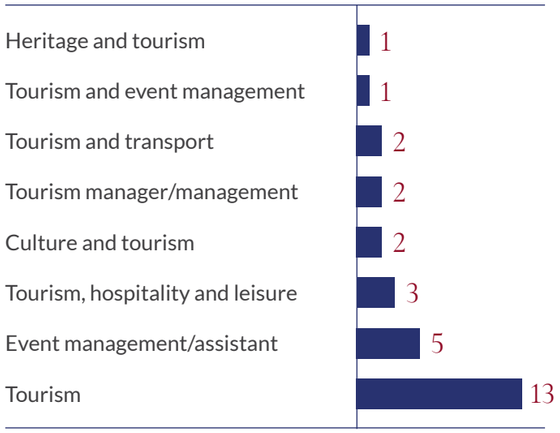
- Intercultural communication and/with language
- Modern language with international experience
- Modern languages and European Studies
- International Relations with French/German/Spanish
- French and International Relations
- International Relations and Modern Languages
- International Relations with Languages (Arabic, French, Spanish)
- International Management Studies with European Languages and Society

Reflecting the concerns highlighted in the Evidence Review, more than half of those interviewed expressed disquiet about the changes in UK policy for languages, in particular relating to GCSE and A-level curriculum design, and how that might further impact upon numbers of applicants to their programmes.

VISIBILITY OF TOURISM AND HOSPITALITY AS A 'DESTINATION OF CHOICE'/ATTRACTIVE CAREER PROSPECT: Of the 43 institutions, 16 (37%) mention tourism as a career prospect in relation to employability and graduate 'destinations.' As can be seen from the graph below (Figure 10) the tourism sector tends to feature in very generic terms. Whilst a few programmes distinguish specific aspects of tourism (e.g. culture, transport, heritage), tourism specific career pathways are not identified. Interestingly, events are mentioned by six programmes, but hospitality is not listed at all. Perceptions of the tourism and hospitality sectors as potential destinations of choice will be discussed later from the perspective of Programme Directors.

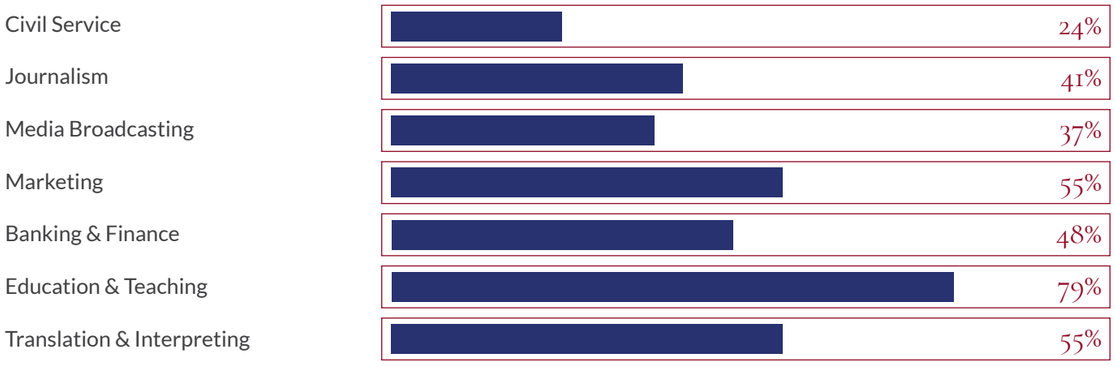
COMMON CAREER PATHS FOR MODERN LANGUAGE GRADUATES: (Figure 11) identifies the common career paths promoted to modern language graduates in the 29 institutions of the sample where tourism is not listed as a career prospect. Education and teaching, translation and interpreting, and marketing, are featured by over half the institutions, reflecting the core employability destinations for modern language graduates.

Figure 10: Tourism- related career prospects as listed on programme websites



Showing the number of language programmes which mention 'tourism-related' terms in connection with employability

Figure 11: Most common career paths listed by modern language programmes which do not state tourism



A wide variety of additional career paths is mentioned across the university websites and are summarised in the word cloud below (Figure 12), reflecting the diverse sectors and fields that modern language graduates can work in, from business, the arts, publishing, and diplomacy to third sector organisations.

These figures confirm the broad findings from the interviews with the Programme Directors, who identified teaching, translation, interpretation, media, finance, law conversion, HR/Business, marketing/PR and the civil service as common career paths. Career paths which were cited as 'visible' but not commonplace were journalism, publishing, project management, foreign affairs and tourism and hospitality management (including airlines and hotels).

The Programme Directors' perceptions of **language graduate aspirations** were seen to focus heavily around translating and interpreting in an international context. Little emphasis is placed upon encouraging students towards specific career paths at the outset of their degrees, as it is felt they arrive at university with little or no idea of what they want to do upon graduation, and with little grasp of the diversity of careers open to them. On the other hand, this might be the very time to open undergraduates' eyes to the broadest possible range of possible career paths.

Many of the Programme Directors were quick to note that they felt the primary responsibility for engaging undergraduates with employability rested with the university central careers service, in the form of activities such as careers fairs, alumni events, careers weeks and online material linked to career pathways, with limited input from academic staff. This was felt appropriate since the Programme Directors perceived the majority of the language lecturing staff as academic linguists with limited experience of the wider workplace. **The fact that academic language staff are in effect divorced from much of the employability activity may represent a missed opportunity to foster a cohesive career development strategy for undergraduate language students.** Although often on the edge of employability activity, the Programme Directors sense an increasing demand from their institution for staff to engage with local employers, to encourage and inspire tomorrow's graduate and to maintain links with alumni so that they can deliver aspirational 'success stories.'

Figure 12: Less common career paths listed in modern language programme webpages

Figure 13: Generic skillsets linked to language degrees (according to university websites)

The interviews with Programme Directors highlighted a tension between the delivery of modern language undergraduate programme content, and what can be offered in terms of employability. **The biggest challenges associated with universities offering language degrees which support employability lie in the perceived difficulties of 'making room' for employability within a curriculum understandably dominated by, and focused upon, language development and linguistics, culture and history in a traditional sense.** A dilemma was raised within the interviews that undergraduates' demand for 'employability content' cannot always be met due to a lack of 'space' within the curriculum and sometimes the unwillingness, and even opposition, to removing critical curriculum content to 'make space.' Additionally, most Programme Directors were of the opinion that modern language degrees are not there to provide a focus on any particular career, and that many of the wider employability skills are developed as part of the students' year abroad, not necessarily whilst studying the core curriculum.

Skills sets – modern language graduates: Across the sample of 43 universities, 29 (67%) list a variety of skills sets attached to their language programmes. As these are generic skills, all of them without exception would be applicable to working within the tourism industry in some way (Figure 13 above). Modern language graduates also bring with them intercultural competence and sensitivity, valuable for working within international contexts.

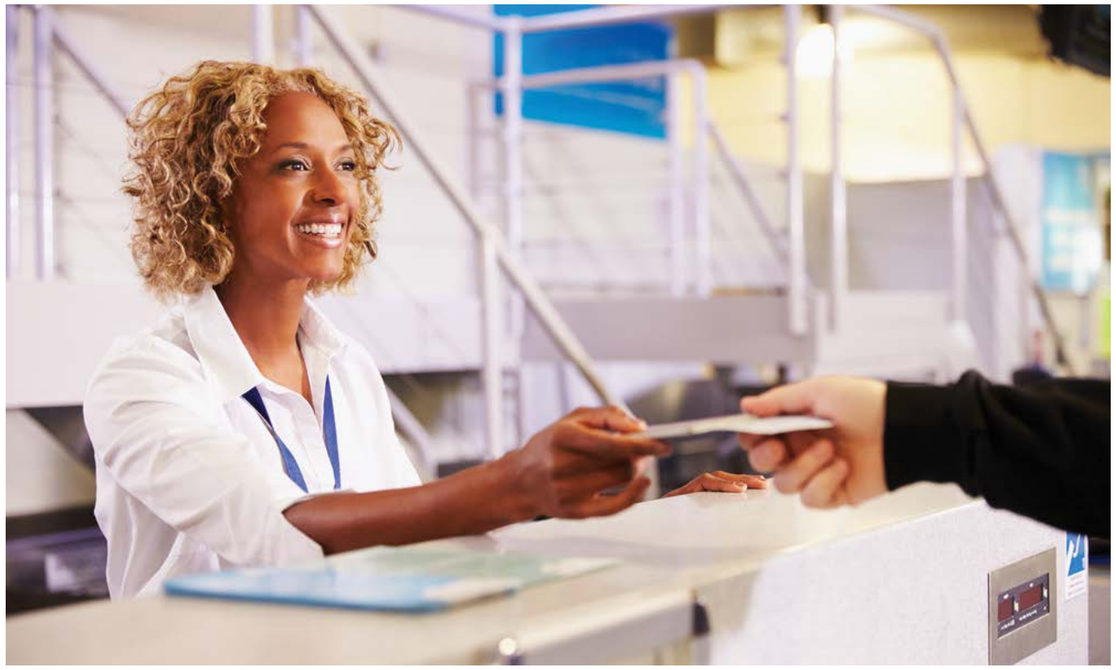
Modern language Programme Directors' perceptions of tourism and hospitality as attractive career pathways: The Programme Directors' interviews provided insights into perceptions regarding the appropriateness of tourism/hospitality sectors as destinations for language graduates. Interviewees showed considerable variation in terms of the extent to which they were aware of tourism and hospitality as potential careers for language graduates, and their propensity to think that these are viable/worthwhile goals for their graduates. During the interviews, it was apparent that there is a lack of knowledge of the tourism sector and tourism specific career pathways. **References were made to graduates taking part time work in hospitality to support them during their degrees, but not necessarily as part of a clearly defined career pathway.**

On the modern language degree programme websites of the 43 universities audited, only 16 (37%) list tourism as a potential career. When these universities were analysed against type of institution, defined both by ranking[11] and university type (i.e. Russell Group, non-Russell Group or Post-92 universities), no particular pattern emerged. Tourism, and most notably hospitality, were lacking as identified career paths across the sector as a whole. Furthermore, with regard to **postgraduate** pathways for modern language graduates, neither tourism nor hospitality related postgraduate programmes were listed as a route to further study.

The evidence drawn from both the wider website audit and the 15 Programme Director interviews shows that tourism and hospitality are not particularly visible as a primary career choice for modern language graduates. The sectors were mentioned in the interviews as being appropriate for part-time jobs or providing opportunities for students to work in their year abroad – but were regarded with stereotypical perceptions of low pay and unskilled job opportunities. This perception gives cause for concern, given the industry's aspirations to raise the image of the sector and make it a career of choice (as discussed in section 3.2 of the Evidence Review). Furthermore, the interviews emphasised that **tourism and hospitality are not promoted by the language departments as they are not seen to be an 'obvious enough' career path**.

There is clearly a lack of success stories of language graduates who go on to have their careers in tourism and hospitality. There is also a striking absence of examples of specific tourism and hospitality career pathways on the university modern language programme webpages, and tourism careers were often spoken about in vague terms by many Programme Directors. They understandably do not always feel fully equipped to counsel students on the wide range of diverse career paths, including tourism, which modern language students can take, and this job is often left to the careers departments within the institutions.

Additionally, it appears that Programme Directors do not feel that the industry is actively highlighting career pathways for students with modern language degrees, **and it is possible that careers advisors or modern language Programme Directors at universities are not promoting tourism and hospitality as a career path because the industry is not**. In the cases where some, albeit limited, support for tourism and hospitality was evident, it was felt to be prompted by the potential of the year abroad to open undergraduates' eyes to the world of travel.



11. The Complete University Guide 2018-19 www.thecompleteuniversityguide.co.uk/league-tables/rankings

06 • SUMMARY

1. 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 (2017), KPMG (2017), People 1st (2017b, c) and the *Tourism Sector Deal* (VisitBritain, 2017) 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 (People 1st 2017a) and for long term employees with a wide range of 'soft skills'.

2. 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* (2016) 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 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.

3. 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 (Tinsley and Board 2017a). 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 disparities in the uptake of languages are striking, with the greatest decline in language uptake at secondary level occurring in schools in areas of high socio-economic deprivation.

4. The overall decline in the study of modern foreign languages in the UK is accompanied by a shift away from 'traditional' languages such as French and German, and the uptake of 'other' languages including Arabic and Mandarin (Tinsley and Board 2017a). Whilst this represents a shift towards the languages of the UK's key inbound growth markets, in the context of the decline in language learning generally, the growth of a home-grown talent pool in these languages remains somewhat slow and limited.

5. Despite the lack of a coordinated languages policy in the UK, a strong lobby is building in favour of establishing an appropriately resourced national strategy for languages, led by organisations such as the British Academy, the British Council, the All Party Parliamentary Group for Languages, in addition to university language departments and policy think tanks. In the absence of a coordinated strategic approach, initiatives such as the *Mandarin Excellence Programme* (UCL nd) and *Routes into Language* (Leadership Foundation, 2016) have gone some way towards addressing language education needs in schools, but the experiences of both have raised concerns about the long-term sustainability of such initiatives when not set within the framework of a coordinated language strategy.

6. 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 (Council of Europe, 2001). In terms of the development of business proficient language skills for the tourism industry, this can be understood as *an advanced level of plurilingual skills defined by the ability to communicate professionally in a B2B and consumer-facing role.*

7. Developing and maintaining language skills takes place not only within a formal educational context, but in a range of 'language-friendly learning environments', including organisations and social and cultural settings more widely (European Commission, 2012). In addition to the question of continued ability to recruit EU nationals post-Brexit, it will be important to maintain the links that contribute to the maintenance of a language-friendly learning environment, including access to Erasmus and other study abroad programmes, or the development of bilateral alternatives.

8. 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 (THE, 2017) and the rising popularity of IWLP (institution wide language provision) (Leadership Foundation 2016) 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.

9. 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 destinations, suggesting potential scope for the tourism industry to take a more active role in promoting itself as a career option to modern linguists.

10. The Audit of language provision within the undergraduate and postgraduate tourism and hospitality programmes in the UK revealed that only 29% and 6% of programmes

respectively offer modules in modern languages; most of these as options rather than compulsory. 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 to build more recognition of the demand for such graduates and further strengthen the image of the industry as a 'career of choice'.

11. This study is supply-focused in its examination of the potential talent pool about to enter onto career pathways with business proficient language skills, some with additional tourism and/or hospitality specialisms. In the lead up to a post-Brexit landscape, concerns are increasingly being expressed about the industry's access to a workforce with multilingual skills. However, the Evidence Review does identify a research gap and the need for a more detailed demand-focused study of the perceptions and experiences of the industry. Whilst recent governmental inquiries have provided a platform for the 'industry voice', it is often the key umbrella organisations and industry bodies who engage on behalf of the sector and their members. What is required is a more active engagement at an organisational level to further strengthen the evidence and to identify more fully the language needs of the industry at all levels, from front-of-house to management, and to communicate potential career pathways.

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The UKinbound Tourism Languages Skills 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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