The Future of Hospitality Management Education

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Disclaimer: All data used in this report was collected prior to Covid-19

Executive Summary

Hospitality management education in the UK is being challenged by declining student numbers coupled with a demographic dip, changes in students' preferences and a complex operating environment. The purpose of this report is to provide a trend analysis and forecast that examines past and future data of hospitality management education student numbers in UK and European further and higher education institutions. Secondary data were used to gather the information for this report. This was achieved through a systematic literature review, trend analysis of students' enrolment data and a functional benchmark analysis.

Key Findings

- Student enrolments in hospitality management are beginning to show an upturn in the UK. The picture is mixed for Europe as the data varies by country.

- The hospitality industry still has a pivotal role to play in championing hospitality management education through captains of industry and working closely with educational providers in ensuring the right blend of technical and vocational knowledge.

- There is no clear consensus on why students choose to study hospitality management. This is based on a variety of factors and varies by countries.

- The tides are beginning to turn on hospitality's image problem. For hospitality graduate schemes more employers are asking for a degree in hospitality management. However hospitality businesses need to consider how they can compete with those in other industries which pay more, ask for less work experience and often offer better career structures.

Recommendations

- Make further and higher education providers aware that enrolments in hospitality management are starting to show an increase.

- Explore how to enable captains of industry. These people are hospitality business leaders with influence. Captains of industry can strengthen and further develop industry-education collaboration by being strong supporters of hospitality management education. This can also help to combat hospitality's image issue.

- Investigate how the hospitality industry can become more professionalised by working further with the industry and professional bodies. This may help to reduce the negative industry perceptions and add value to having a hospitality management education.

- Collaborate with the industry to provide support in enabling more competitive graduate schemes and job offers. This could potentially increase the value of having a hospitality management education.

- Utilise the dynamic structure of the hospitality industry as a unique selling point in attracting changing learners. Businesses in the hospitality industry vary by the type of offer (accommodation, food and beverage, leisure services), size (from large multi-national organisations to microbusinesses) and ownership models (entrepreneurs, family businesses, franchise, leasehold, management contracts, joint ventures).

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1. Introduction

This research, commissioned by the Council for Hospitality Management Education (CHME), in association with the Institute of Hospitality (IoH), provides an evidence-based situational analysis of the current challenges in the UK and European hospitality industry in terms of skills/talent requirements. CHME's aim is to provide a comprehensive understanding of the future of hospitality management education which can guide stakeholders and decision makers in higher education institutions, professional bodies, government and hospitality businesses.

The hospitality industry employs 3.2 million people, produces £130 billion of economic activity, represents 10% of UK employment and is experiencing a skills shortage (UK Hospitality, 2018). These statistics would usually signify positive developments for the hospitality industry and a growing, educated labour market. Contrary, there is a decline in recruitment to hospitality courses across further and higher education in the UK and Europe which has prompted a disinvestment in hospitality management education by several institutions.

Currently 66 further and higher education institutions in the UK offer 179 hospitality courses ranging from Higher National Certificates and Diplomas, to Foundation Degrees and first degrees (Unistats, 2019). As recruitment onto tertiary level hospitality courses has become more strained in the UK, both educators and industry appear to be turning towards building awareness of careers in hospitality in the secondary school setting and challenging the negative perceptions of the industry around long hours and low pay (UK Hospitality, 2018). Although the government is supporting the creation of a more vocational educational route with the introduction of T-Levels (GOV.UK, 2018), the roll out of the hospitality and catering qualification has been postponed until after 2022, exacerbating existing staff shortages (The Caterer, 2018). Anecdotally, the ingrained approach to only offering low level apprenticeships in the hospitality industry also needs to be challenged with many higher education institutions

now offering this as an alternative to the traditional full-time degree course and viable pathway into a career in the industry.

From a European perspective, hospitality tertiary education is well established with European Hotel Schools often seen to be leading the way. However, the Head of the European Higher Education Association has stated that the higher education sector must smooth educational differences amongst the European regions, boost local employment and provide students with the new skills needed in a changing labour market (Fortuna, 2019). Therefore, it is important for the education sector, in partnership with industry, to lead in addressing this skills shortage and the current climate of hospitality management education. This report responds to the following questions:

- What are the current skills/talent management challenges in the UK and European hospitality industry?
- How many students are choosing to study for a career in hospitality?
- How competitive are hospitality businesses in the graduate labour market?
- What are the opportunities for hospitality management education providers and industry?

1.1 Methodology

A three pronged approach was used when examining past and future data of hospitality management student numbers. Specifically, the approach consisted of the following:

1.1.1 Systematic Literature Review

A 10 year literature review was completed using the steps outlined by Tranfield, Denyer and Smart (2003) and Adams, Smart & Huff (2017) for undertaking systematic reviews in management studies. Both academic and grey literature were reviewed. A systematic snowballing search was used within the grey literature following references and back citations, and in significant cases with originators of unpublished materials. A reference checking and hand search was also completed for this.

1.1.2 Analysis of Data on Student Enrolments

A 10 year audit (2008 - 2018) of the applications from the Higher Education Statistics Agency (HESA) in the UK was undertaken. An online survey was administered to European higher education institutions to gather data on hospitality management student enrolments and graduate destinations. However the response rate on this was low and the data provided in many cases were not valid. To mitigate for this, the data compiled by Eurostat (https://ec.europa.eu/eurostat) on education was reviewed and used.

The data for both the UK and European students is dynamic and is continuously changing and we were unable to undertake a forecast of trends for 2030. This is particularly the case as the most recent data are indicating that the market may be beginning to change, with an upturn in the number of students enrolling to study hospitality management. This is suggesting the decline in demand for hospitality courses may have levelled out but it is too soon to confirm this. The steady growth of tourism students' enrolments appears to have peaked whilst with events management there is no sign as yet that the falling demand for these courses has stabilised. Additionally, as the impacts of Covid-19 (Coronavirus) are now starting to emerge, this further complicates a forecast of student numbers.

1.1.3 Functional Benchmark Analysis

A functional benchmarking analysis was completed to compare the performance of hospitality management education courses with other related courses and understand the competitiveness of hospitality businesses in the graduate labour market.

1.2 Outline of this Report

This report is organised as follows. Section 2 discusses hospitality management education informed by the findings from the literature review. This then moves on to Section 3 where the results of the student data are presented and discussed. Section 4 focuses on the outcomes of the functional benchmark analysis which then engages with Section 5 which presents opportunities identified from the report. The report concludes with Section 6.

2. Hospitality Management Education

Hospitality education in the Europe and UK has a rich history dating back to 1893 with the opening of, École Hôtelière de Lausanne, the world's first hotel school in Switzerland and the creation of the Westminster Technical College in 1910 in the UK (Matthew, 2007). The continuous, incredible growth and diversity of the hospitality industry has permeated all spheres, and this has resulted in hospitality management education being offered by over 160 institutions in the UK and Europe. This is coupled with a large labour market as hospitality is big business.

In the UK, hospitality generates £130 billion in economic activity, contributes 5% to GDP, is the 3rd largest employer with 3.2 million workers, created 1 in 6 new jobs in the last 10 years and is larger than the automobile, pharmaceutical and aeronautics industry combined (UK Hospitality, 2018). In Europe, it is a critical driver of the European economy as it is the third largest socio-economic activity contributing around 5% to GDP (Eurostats, 2018). Hospitality is also vitally important to the growth and development of the tourism industry (Garg and Garg, 2019) as it employs 80% of Europe's tourism workforce (Eurostats, 2018).

Hospitality is an engine of growth for many economies. Ninety percent of hospitality businesses in the UK are small and medium sized enterprises, (UK Hospitality, 2018) whilst 9 out of 10 of these businesses in Europe are micro enterprises (Eurostat, 2018). The industry is also a substantial employer of young people and women, giving many of them their first work experience (UK Hospitality, 2018). The sections below summarise the key points identified from the literature review relating to the future of hospitality management education.

2.1 The Market Gap

The UK hospitality industry needs to source 200,000 new workers every year to replace churn and support growth, and with the proposed restrictions around migration from Europe as a result of Brexit, another 60,000 workers need to be added to this figure (British Hospitality

Association (BHA), 2017). If these targets are matched against the ambitious growth plans of leading hospitality brands in the UK and Europe then there must be a strong commitment by education providers in developing a successful cadre of future hospitality leaders and operators. Premier Inn, for example, is targeting an additional 85,000 bedrooms by 2020 with over 5000 being in Germany (Premier Inn, 2019).

Statistics published by the Higher Education Statistics Agency (2019) highlight that the number of students studying hospitality based subjects has fallen from 28,275 in 2015/16 to 26,800 in 2017/18. Overall, the Universities UK Patterns and Trends in Higher Education Report (2018) showed a 5.3% decrease in the total number of entrants into higher education institutions since 2007-2008 yet 2016-2017 saw a 49% increase in applications from less advantaged backgrounds than a decade ago. These statistics indicate symptoms of wider issues which require further investigation.

2.2 Why Students Choose to Study Hospitality Management?

There was no clear consensus in the literature on why students choose to study hospitality management. These reasons revolved around gaining a professional qualification (Eraut, 1994; O'Mahony et al., 2001), personal motivations (Kim et al., 2016), external factors such as growth of hospitality in a certain areas/economies, opportunities for travel (Ma et al., 2007), experiencing new cultures (Kim et al., 2016), employability (Busby, 2003), parental and career advisor influence (O'Mahony et al., 2001; Nores, 2010; Wong and Liu, 2010), friends and reference groups (Kim et al., 2016). These motivators varied between Asian and Western students. For example in China, hospitality has been positioned as a significant growth sector, therefore gaining a degree is acknowledged as an important entry point to a career in the industry (Ma et al., 2007).

2.3 Hospitality's Image Challenge

The literature has identified that the degree chosen to study affects students' commitment to their career choice in hospitality (Leppel, 2001; El-Dief and El-Dief, 2019). Whilst we are still finding students choosing to study hospitality management, they are not seeking careers

in the industry, despite displaying a strong passion for the industry (Mooney and Jamieson, 2018). An enjoyable career is key for hospitality students (Brown, Arendt and Bosselman, 2014; Wang, 2016). Industry work placement is cited as one of the primary reason for students no longer embarking on a career in hospitality management (Nachmias 2017; Lee et al., 2019) as this can either make or break (Jenkins, 2001; Chuang, Walker and Caine-Bish, 2009; Chen and Shen, 2012; Kim and Park, 2013; Brown et al., 2014) a student decision to stay in hospitality. Students base their decision to join the industry based on their expectations of their career outcomes (Chuang and Dellmann-Jenkins, 2010; Wan et al., 2014; Wang, 2016). The industry is still characterised as having low pay, low skills, long working hours, stressful and, poor work environments (O'Leary and Deegan, 2005; Roney and Oztin, 2007; Richardson, 2008; Garg and Garg, 2019). This image is challenging in attracting the talent the industry requires (Lo, Mak and Chen, 2014).

When students do decide to study hospitality management a problem ensues that graduates do not see hospitality as their number one career choice (Richardson, 2009; Chuang and Dellmann-Jenkins, 2010; Song and Chathoth, 2011). Studies have reported that on average, fifty percent of graduates do not intend to pursue a career in the hospitality industry (King, McKercher and Waryszak 2003; Richardson 2008; Chang and Tse, 2015).

These data are alarming and it points to hospitality having an image problem. The industry is challenged in locating itself as a great career choice (Barron, 2008; Song and Chon, 2012; Lee et al., 2019). Research has identified a number of factors which do impact on students having a career in hospitality. This is primarily due to the working hours, pay, job roles, work /life balance and culture of the workplace such as aggressive/bullying behaviour and lack of career progression (Richardson, 2009).

Other factors which impact students decisions are tutors, parents (Richardson, 2009; Chuang, 2010; Kim, McCleary and Kaufman, 2010; Chang and Tse, 2015) industry professionals (Jordaan, 2009; Wong and Liu, 2010), social networking sites (Lee et al., 2019) and social status/recognition. This image issue has a strong role to play in the students choosing to study hospitality management and if they do continue in a career in hospitality. Social

status/recognition especially in millennials and Gen Z is important in the careers students choose (Wan and Kong, 2011; Wang, 2016). These students also engage actively with social networking sites such as Facebook and LinkedIn and the information portrayed here about the hospitality industry can guide their decisions about the industry. Brown et al. (2014) found that some graduates, who have left the industry, stated that they would never return.

2.4 Industry Requirements

A successful hospitality industry requires a strong education system (Wang, Ayres and Huyton, 2010) because of the customer service demands. The literature discusses heavily the mismatch between industry expectations and the hospitality curriculum (Anderson and Sanga, 2019; Nachmias et al., 2017). Hospitality management curricula have a strong focus on developing graduates' technical skills however the industry identified a need for greater training in non-technical skills and demonstrated a greater interest in hiring graduates with strong interpersonal skills (Gibbs and Slevtich, 2019). This shift in industry demands prompted a shift in the focus of the hospitality curricula, however it appears that there needs to be some balance with the level of technical and non-technical skills. There needs to be some agreement with industry and academia about what is valued in hospitality management education.

This incongruity has the consequent effect of graduates not seeing the value of having a degree and the industry underestimates the need for an academic qualification (Nachmias et al., 2017). Graduates being unable to use their skills and learning in the industry regard hospitality as an unattractive career choice (Brown et al., 2014). The literature also shows that whilst the hospitality industry value work experience (Green, Hammer and Star, 2009; Suh et al., 2012), they placed little worth in students working towards a degree and gaining the higher learning required to become industry leaders (Brown and Hesketh, 2004; Heaton, McCracken and Harrison, 2008; Wolf, 2011).

Whilst some hospitality employers undervalue a degree in this industry, other industries are keen to employ students with hospitality degrees because of the high level of interpersonal

and customer service skills. These transferable skills of hospitality graduates are enabling them to be employed in other industries (Nachmias et al., 2017). There is a war for talent. This is a double edge dilemma. Hospitality management education must produce industry ready graduates via the curriculum. The industry also has a responsibility in championing the development of higher learning for the continued success of the industry and ensuring that graduates are placed in appropriate roles utilising their skills and knowledge. Experiential and practical education is essential if students are to develop the soft skills required to work in the hospitality industry of the future. Education should take an experience based approach to learning but there is a need for industry to recognise the strengths and value of a hospitality degree. It is undeniable that educators should partner with the industry to improve the overall profile of hospitality employment and promote the importance and value of the hospitality industry (UK Hospitality, 2018). Such partnerships would ease the tensions between academia and practice especially as hospitality management educators are faced with the challenge of meeting the needs of multiple stakeholders with regards to promoting students' general academic growth, maintaining a relevant practice focus and the need for balance in this area (Lugosi and Jameson, 2017).

2.5 Changing Learners

Hospitality management education also faces the challenges of the changing learner. Societal shifts have meant a movement towards a consumer led society in which 'modern life may differ in quite a few respects – but what unite them all are precisely their fragility, temporariness, vulnerability and inclination to constant change' (Bauman, 2012, p.2). The education environment is reflecting these changes with students as consumers, the marketisation of education (Molesworth, Nixon and Scullion, 2011), and a focus on student attainment, employability, widening participation and lifelong learning (Marr and Jarry, 2011).

However, the focus of hospitality educators should not only revolve around attracting students but also ensuring they continue from their studies into employment in the industry. Mooney (2017) suggests that this challenge for hospitality educators may be related to

effectively managing students' career expectations as she found that intentions to stay in the industry reduced over the duration of their course because they were increasingly exposed to the realities of working in the industry through placements or work experience. The Destinations of Leavers from Higher Education Report (DHLE) produced by the Higher Education Statistics Agency (2018) also shows a slight decrease of students from non-science subjects entering the accommodation and food services sector upon graduation from 13,625 in 2012/2013 to 12,785 in 2016/17.

3. Student Data

Initially, this analysis was utilising student application data. However, on further review, the decision was made to use enrolment data. The reasons for this are:

- Enrolment data provide the actual number of students studying hospitality management rather than the number that have applied to study hospitality management. Application data only gives an indication of the number of applications rather than the students who actually start the course. In some cases students make multiple applications to one institution and will apply for a course as insurance. To avoid double-counting, enrolment rather than application data were used.

- Using enrolment data allowed comparison with other subject areas such as tourism, events, business and management.

- The focus on first year allows the identification of trends on a year by year basis on the actual number of students starting hospitality courses.

- The focus on First Year, First degree allows comparison with the data from Eurostat.

3.1 The UK Perspective

The figures presented in this section provide a trend analysis but it is important to note that these trends must be interpreted in light of the actual number of students enrolled as seen in Table 1. Whilst the data show a picture of decline over this period, the changes in demand for hospitality courses are reflective of what is happening in the broader subject areas of hospitality, leisure, sport and tourism. It also highlights that the drop in demand is more pronounced in other courses.

Table 1: First Year, First Degree, Full-Time Enrolments

.	2014/15	2018/19
Business and Management	38640	46220
Hospitality, Leisure, Sport and Tourism	8250	7190
Hospitality	940	795
Events	2110	1475
Tourism	1120	1320

Source: HESA, 2020

3.1.1 The Demand Side

Figure 1 demonstrates that the broad subject area of N8 (hospitality, leisure, sport and tourism) experienced significant growth from 2007/8 to 2011/12. This growth may be attributed to the popularity of courses in event management. From 2011/12 there has been a steady decline. Interestingly the decline for enrolments in business and management studies started in 2009/10, two years prior to that of N8 and these courses are experiencing a period of recovery. Whilst courses in hospitality, leisure, sport, tourism and transport are showing a decline in enrolments, the number of enrolments is still higher than 2007/2008.

Figure 1: UK Enrolments of Hospitality, Leisure, Sport and Tourism (N8) with Business Studies (N1) and Management Studies (N2) using Principal Joint Academic Coding of Subject Codes (JACS)
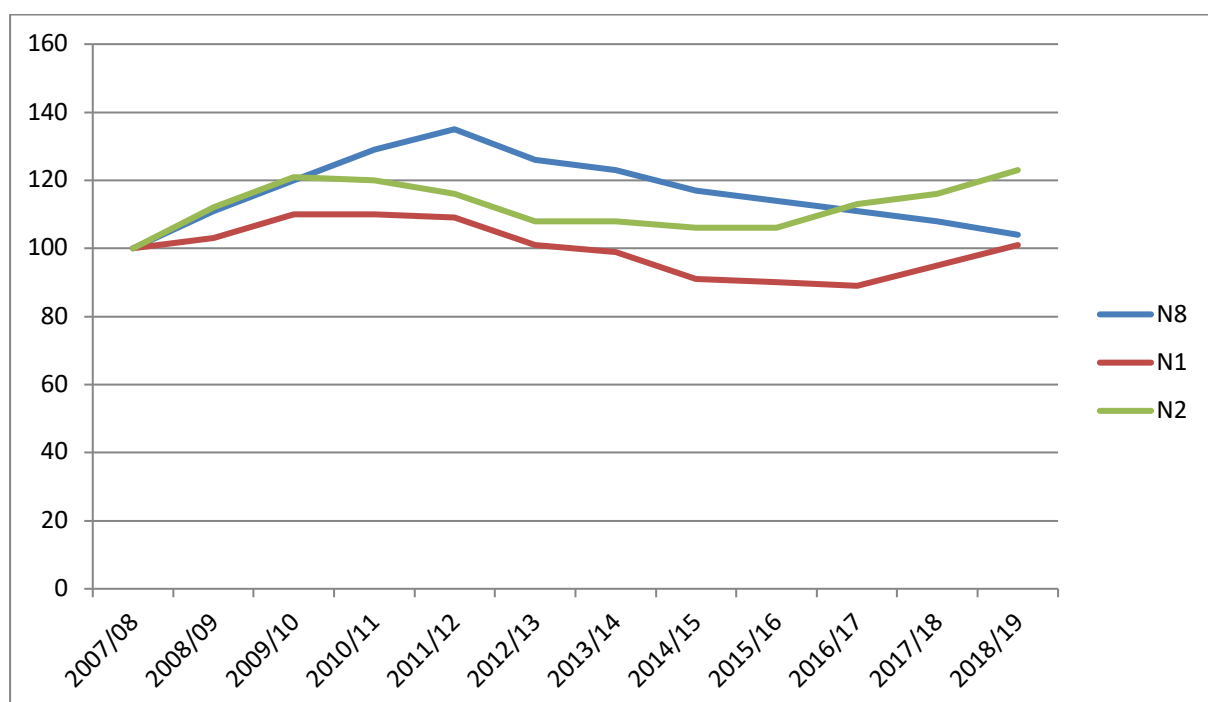
Source: HESA, 2020

Figure 2 has been indexed to a base of 100 from year 2014/15. The total number of students on all degree courses (this include higher national diplomas, foundation degrees and other

qualifications) has shown constant growth. Business and management and tourism courses show continuous growth with 18/19 being a stable year for tourism. Courses in events and hospitality management have experienced a steady decline, however, this decline for hospitality courses is stabilising with enrolments for 18/19 showing no further decline.

Figure 2: First Year, All Undergraduate Full-Time Enrolments
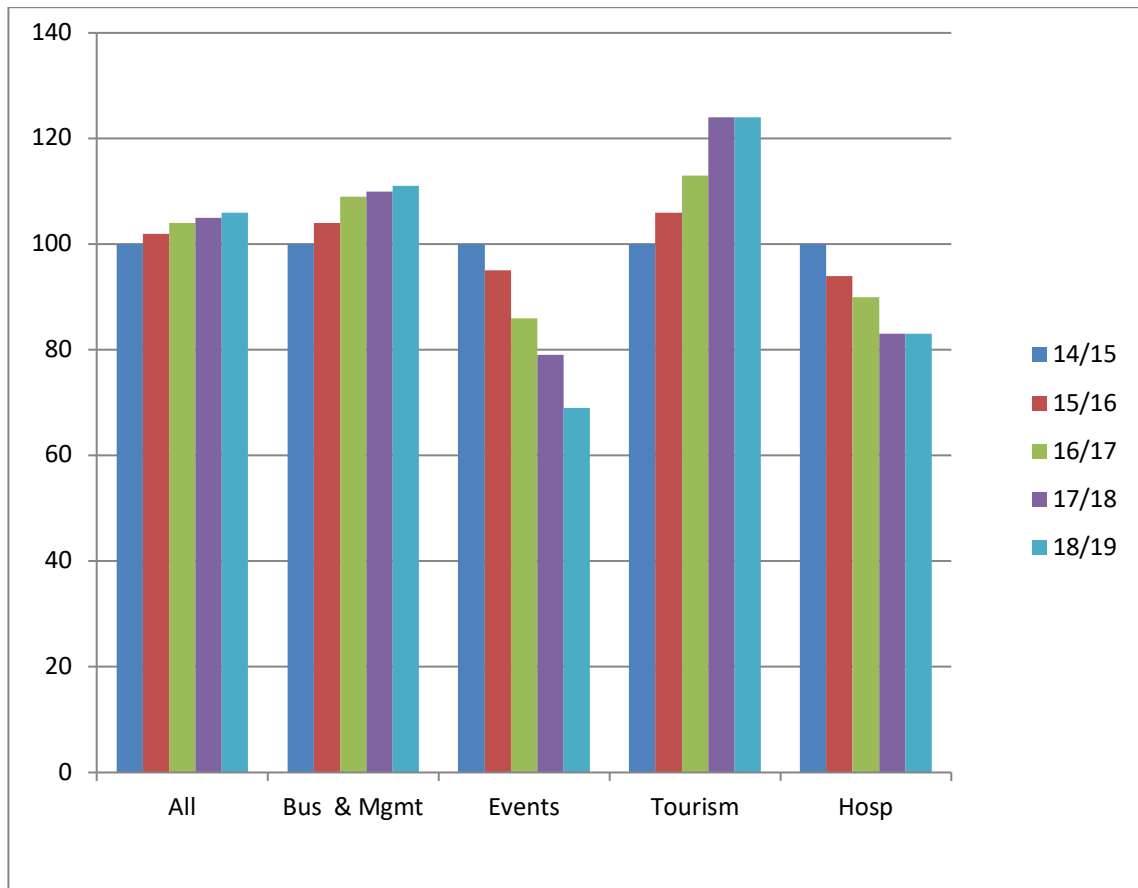
Source: HESA, 2020

Similar to Figure 2, the data for Figure 3 has been indexed to a base of 100 from year 2014/15. The total numbers of students on all degree courses has shown a steady growth with business and management portraying a similar picture. Events courses are experiencing a steady decline with an overall decline in enrolments of 31% over the period. Tourism courses showed slight growth in 15/16, followed by a decline in 16/17 and a sharp increase in 17/18 and showing a slight decrease in enrolments for 18/19. During the period 14/15 - 17/18,

hospitality courses experienced a continuous decrease in the number of enrolments by 15%; however, the data for 18/19 show an upturn in this with the number of enrolments increasing.

Figure 3: First Year, First Degree, Full-Time Enrolments
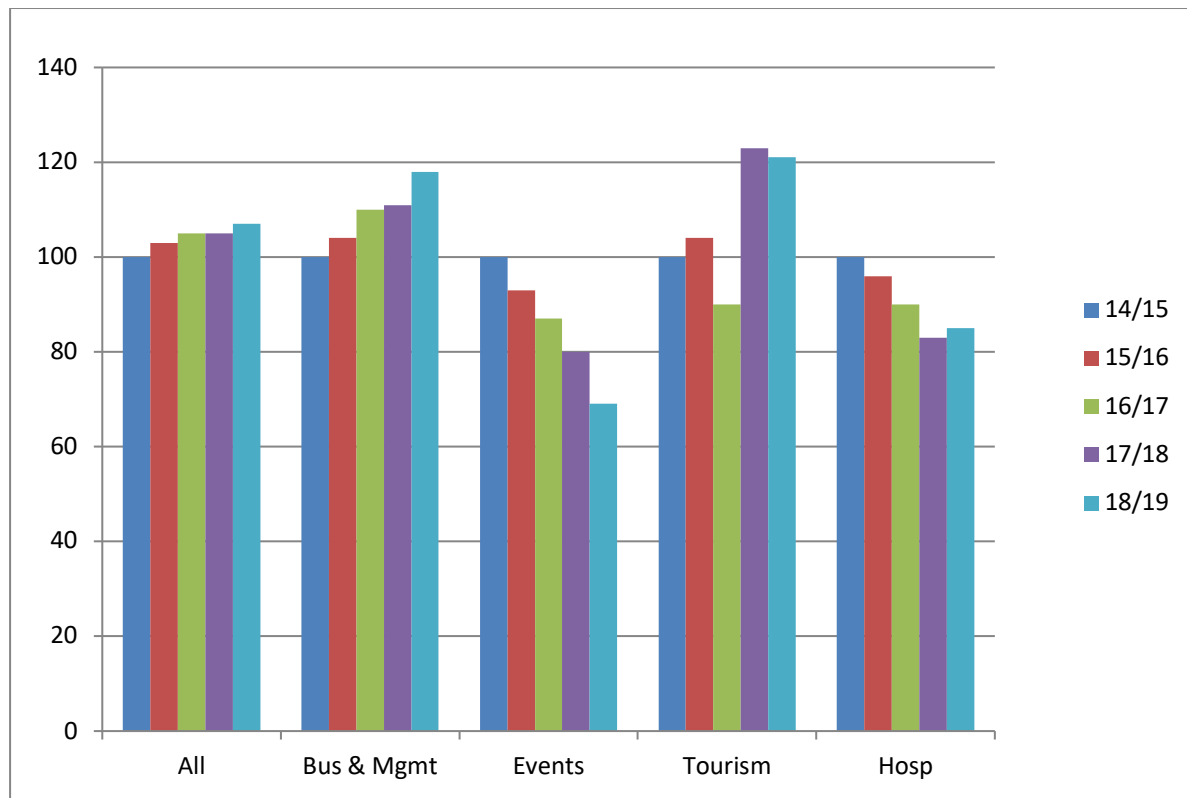
Source: HESA, 2020

Table 2: Percentage Change of First Year, First Degree, Full-Time Enrolments

Year	All	Bus & Mgmt	Events	Tourism	Hospitality
14/15	100	100	100	100	100
15/16	103	104	93	104	96
16/17	105	110	87	90	90
17/18	105	111	80	123	83
18/19	107	118	69	121	85
% change	**7%**	**18%**	**-31%**	**21%**	**-15%**

Source: HESA, 2020

3.1.2 The Supply Side

Figure 4 highlights that whilst hospitality management student demand was falling; the number of courses being offered was increasing. This is creating an excess supply and may explain why the decline in numbers has been felt so sharply.

Figure 4: Student Enrolments vs Number of Institutions
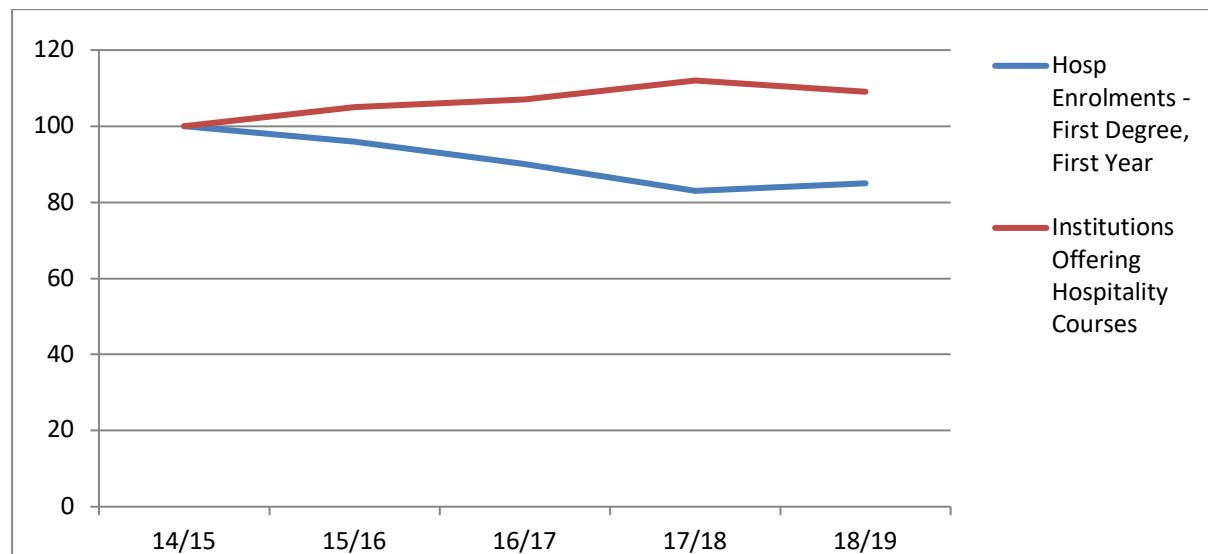
Source: HESA, 2020

However a number of institutions are now exiting which may create stability in the market. Figure 5 shows that the growth in the number of institutions in the UK entering the market for delivering hospitality, leisure, recreation and tourism courses grew from 2013-2016 after a decline in 2011. We are now seeing a steady decline in these figures from 2016-2020. The number of institutions offering courses in this area has declined from 61 in 2010 to 57 in 2020, which represents a 6.6% decrease over the decade but an 11% decrease from the highest point in 2016.

Figure 5: Number of UK Universities Offering Courses in Hospitality, Leisure, Recreation and Tourism over the Last Decade
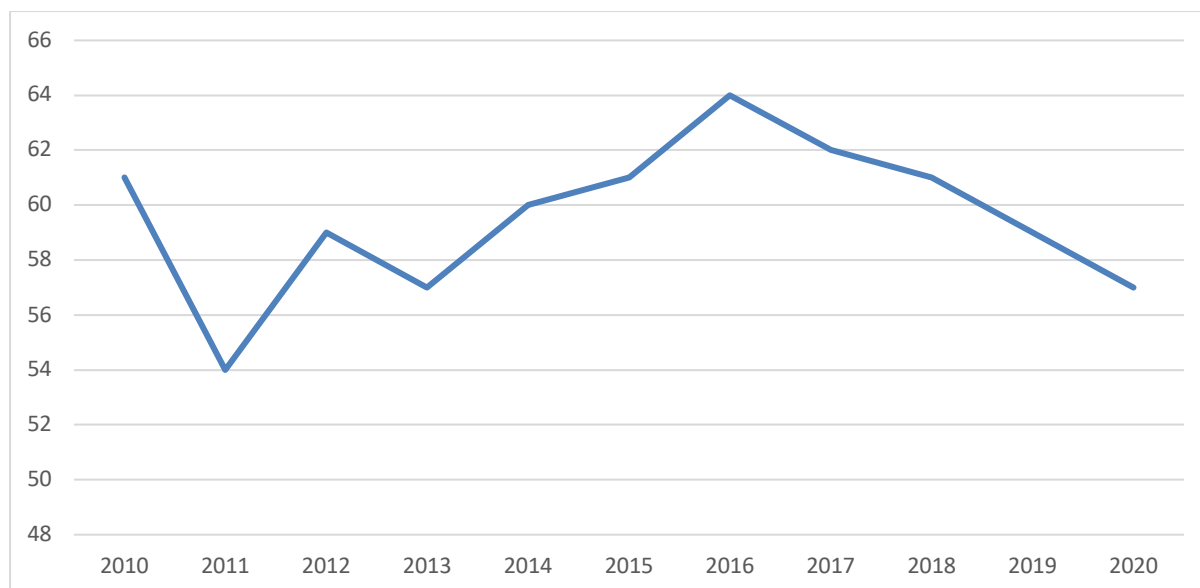
Source: The Complete University Guide, 2020

3.2 A European Perspective

Using Eurostat data, student numbers were analysed for Belgium, Ireland, France, Netherlands, Portugal, Finland and Switzerland. These countries were selected because they had the most complete data sets available through Eurostat and they are also recognised for the provision of hospitality management education. The standards for international statistics on education are set by three international organisations:

- the United Nations Educational, Scientific, and Cultural Organisation (UNESCO) institute for statistics (UIS);
- the Organisation for Economic Cooperation and Development (OECD);
- Eurostat, the statistical office of the EU.

The data used in this analysis is a joint UNESCO/OECD/Eurostat (UOE) data collection on education statistics and this is the basis for the core components of Eurostat's database on education statistics.

In terms of gaining a picture of the trends, it is apparent that the numbers of students enrolled in bachelors' programmes covering hotel, restaurants and catering over the period 2013-2017, is a mixed picture. For some countries the enrolment figures have remained relatively stable (Belgium), for others there has been a decline in enrolment numbers especially between the years 2016-2017 (Ireland, France and Portugal). Finland, however, has been experiencing a steady decline in enrolment figures from 2013-2017 in a similar pattern to the UK. In comparison the Netherlands has seen steady growth and Switzerland has seen some small growth over the same period, although 2013 and 2014 data for Switzerland are not supplied by Eurostat.

Figure 6: Number of Students Enrolled in Bachelors' Education (Including Full and Part-Time Studies) in Hotel, Restaurants and Catering
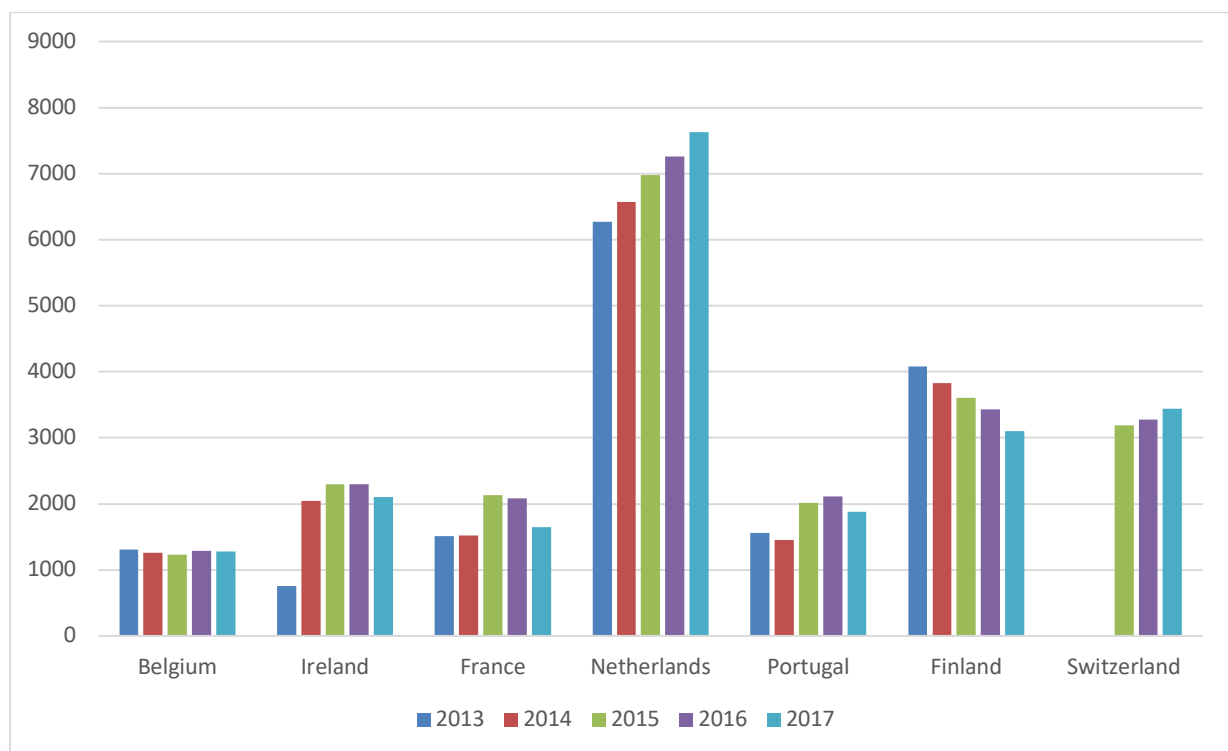
Source: Eurostat, 2020

Figure 7 highlights that enrolments for courses in Business Administration are growing (Belgium, Ireland, France and Switzerland) or are relative stable (Netherlands and Finland). Only Portugal saw a decline from 2014-2015 but again this has now stabilised.

Figure 7: Number of Students Enrolled In Bachelors Education (Including Full and Part-Time Studies) In Business Administration
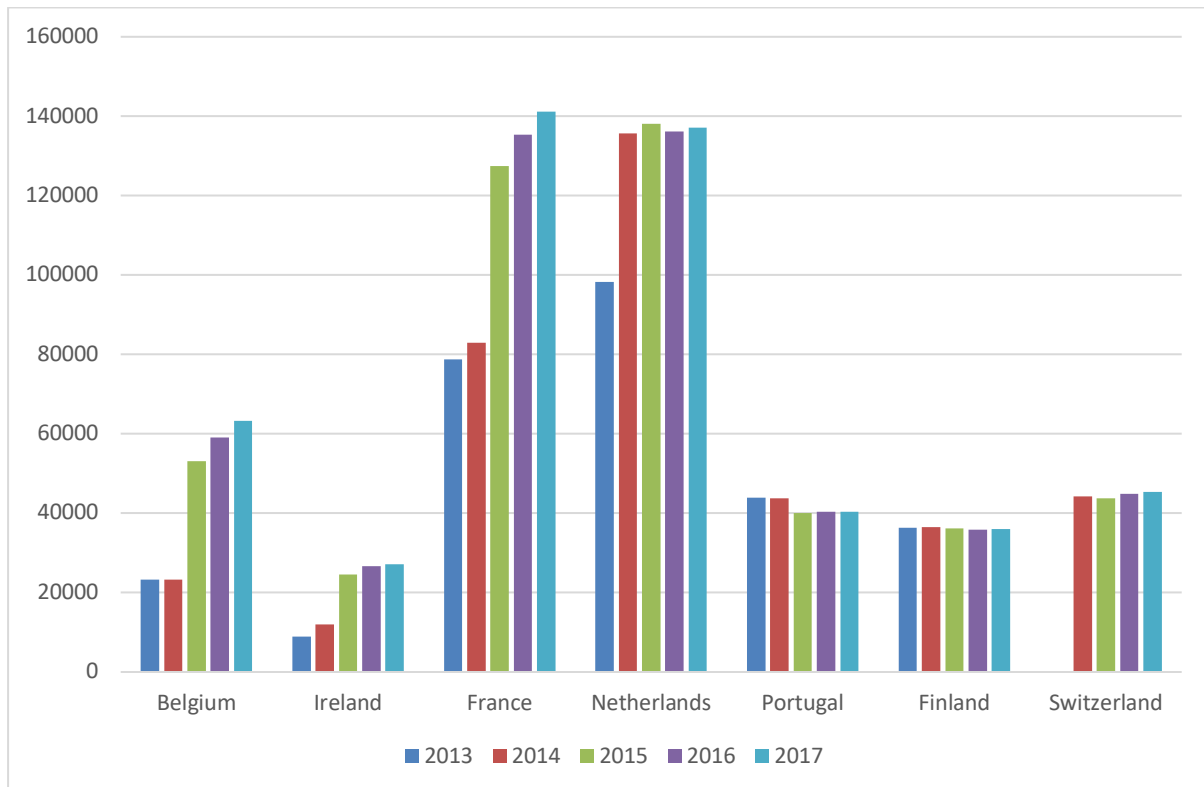
Source: Eurostat, 2020

Figure 8 compares the trends in the number of enrolled students in business administration courses at the bachelors' level with those enrolled in hotel, restaurant and catering courses, at the same level, across the sample of European countries chosen. It demonstrates the wider popularity of the business administration subject area as compared to hotel, restaurants and catering and that the majority of countries have seen a growth in this area with the exception of Portugal and Finland. However, even here the decline in enrolment numbers of business administration has been relatively small.

Figure 8: Comparisons of the Number of Enrolled Students at Bachelors Level in Business Administration and Hotel, Restaurants and Catering
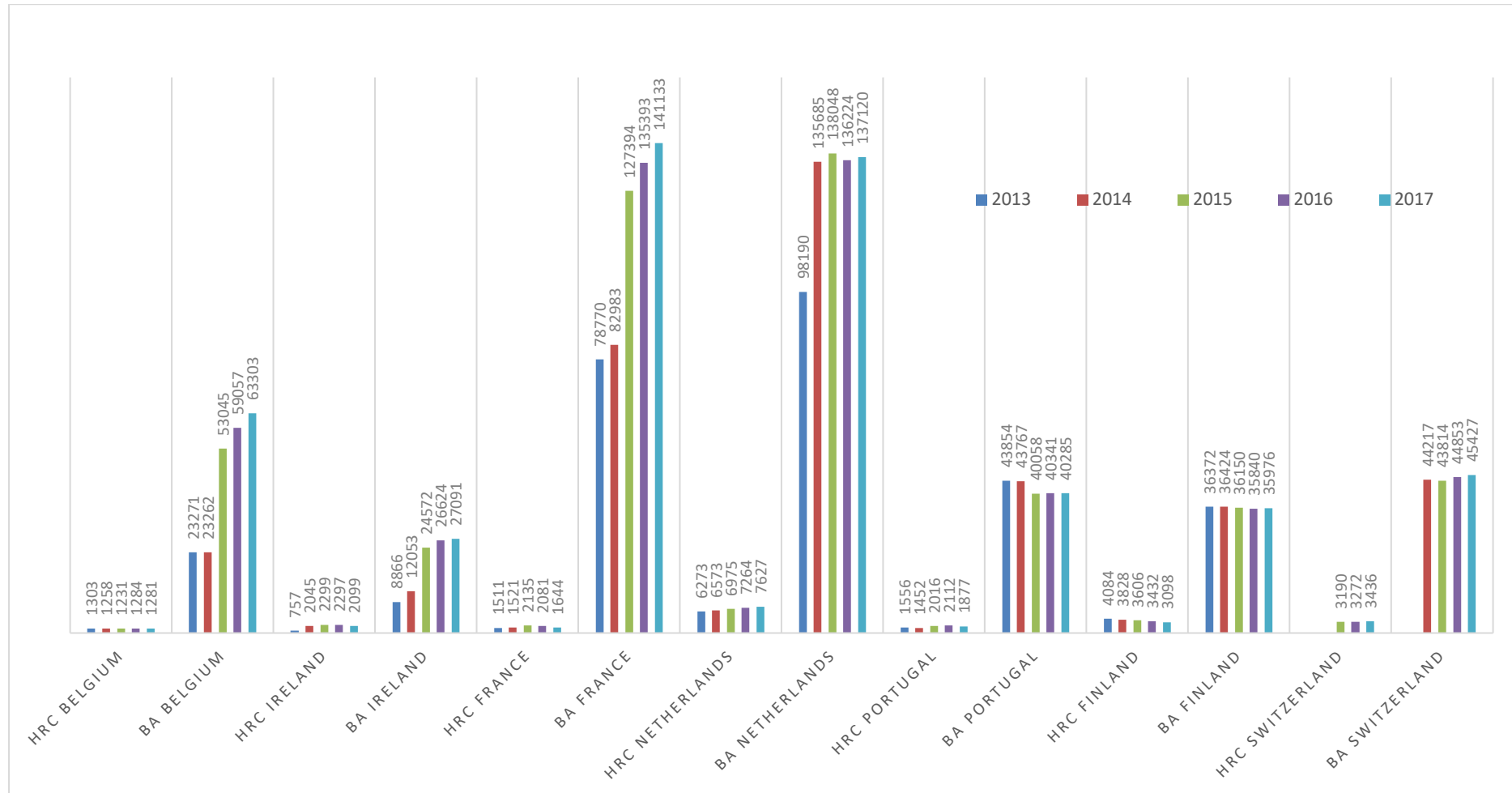
4. Comparative Benchmarking

A review of the literature identified an upwards trend of diversified graduate employment paths, with an increasing number of hospitality management graduates entering into both hospitality graduate roles and more general business sector roles (Hospitalitynet, 2018). In order to better understand the performance of hospitality courses, the industry offer and subsequent graduate employment outcomes, a benchmarking exercise was undertaken in which various data in the UK were analysed, including course offers and student end destinations as graduates. As with the enrolment data, data were collected in relation to hospitality, tourism, events, leisure and generic business and management courses across the UK to give a comparative analysis. A similar segmentation approach was taken in relation to understanding graduate employment destinations utilising data from HESA's (2018) destinations of leavers from higher education statistics and the Higher Education Careers Services Unit (HECSU).

4.1 Course Offer

A comparative analysis of hospitality and business/management courses was undertaken to gain a broad understanding as to the variance and similarities in course offers. Benchmarking occurred against set criteria including:

- QAA course overviews
- QAA purpose of degree
- QAA standards and skills expected
- Expected graduate attributes

See Appendix A for a breakdown of what was used for the analysis. The benchmarking of hospitality management courses against business/management courses indicate that there is some crossover between the two with business management and leadership studies forming the basis of both areas of study. Added to this, business/management courses also appear to be developing softer skills with 'enhancement of a wide range of skills and attributes which

equip graduates to become effective global citizens' (QAA Benchmark Business/ Management). As well as this, 'courses in hospitality have evolved significantly beyond their original vocational focus to combine technical, management and scientific disciplines' (Hospitality QAA Benchmark) aligned to what is purported in the literature as industry requirements (see section 2.4). Such effects are evident with some vocational elements such as training laboratories, which are often seen to further enhance soft skills, being removed from the curriculum offer.

4.2 Graduate End Destinations

To understand the graduate end destinations for these courses and the industry offer currently available, a comparative analysis of large corporate hospitality management and generic business graduate opportunities was undertaken by benchmarking advertised graduate roles against:

- The requirement for a degree
- Experience required
- Desired skills
- Pay scales
- Length of graduate programme

The hospitality graduate schemes reviewed utilised the top 5 Hotel Graduate Employers (Whitbread, Marriott, Hilton, IHG, Carlsen Rezidor Hotel Group) and the top 5 Graduate Careers in pubs, restaurants and fast food chains (Mitchells and Butlers, Compass Group, McDonalds, Greene King and Marston's) according to Target Jobs (2019) as a basis, in addition to other well-known brands (Mandarin Oriental, Jurys Inn, Red Carnation and Firmdale. General business employers were selected from The Times Top 100 graduate employers (Bridgewater UK, 2019) and included Aldi, PWC, Deloitte and Google. Table 3 below gives an overview of the key findings in relation to the above criteria.

Table 3: Graduate Role Requirements

	Hospitality Management	Generic Business
Degree requirement	Majority of employers require a hospitality degree	Any business related degree
Experience required	Majority require 12 months experience in hospitality	Majority do not require any work experience
Desired skills	Passion for hospitality Passion for learning Leadership potential Team orientated and able to collaborate Communication skills Agile and able to work in a fast paced and challenging environment Ability to self-manage	Willing to learn Team worker Communication skills Person orientated skills Decision making Initiative Problem solving Passion for learning
Pay scale	£20,000 - £22,000	£29,000 - £44,000
Length of graduate programme	1 - 2.5 years	1 - 2 years

The fact that many hospitality employers are requesting hospitality related degrees and/or 12 months experience in hospitality indicates that larger corporate companies strongly value the specific knowledge and skills developed through a hospitality degree and industry specific work experience. This does not however provide a full picture with 90% of the hospitality industry being made up of SMEs (UK Hospitality, 2018). Here, recruitment is often characterised by informal and reactive recruitment practices aimed at filling immediate needs (Nachmias and Walmsley, 2015). This leads to questions on whether hospitality degrees are being fully valued by industry and the extent to which graduate attributes are being effectively utilised when working in the industry (Holden, Jameson and Lashley, 2005).

There is substantial crossover in the skills required for hospitality graduate roles and generic business roles, with a focus on soft skills. This supports the report that hospitality graduates are desirable to other businesses whilst at the same time other businesses are attractive to hospitality graduates with the offer of more attractive remuneration packages

(Hospitalitynet, 2018). The desire for such soft skills substantiates the need for higher education hospitality management courses to focus on developing these skills as outlined in the QAA Benchmarks.

In relation to salaries, there is a distinct gap between hospitality and generic business schemes. Figure 9 demonstrates where hospitality sits in comparison to the average graduate starting salaries in the UK.

Figure 9: Changes in UK Graduate Starting Salaries 2010 - 2020
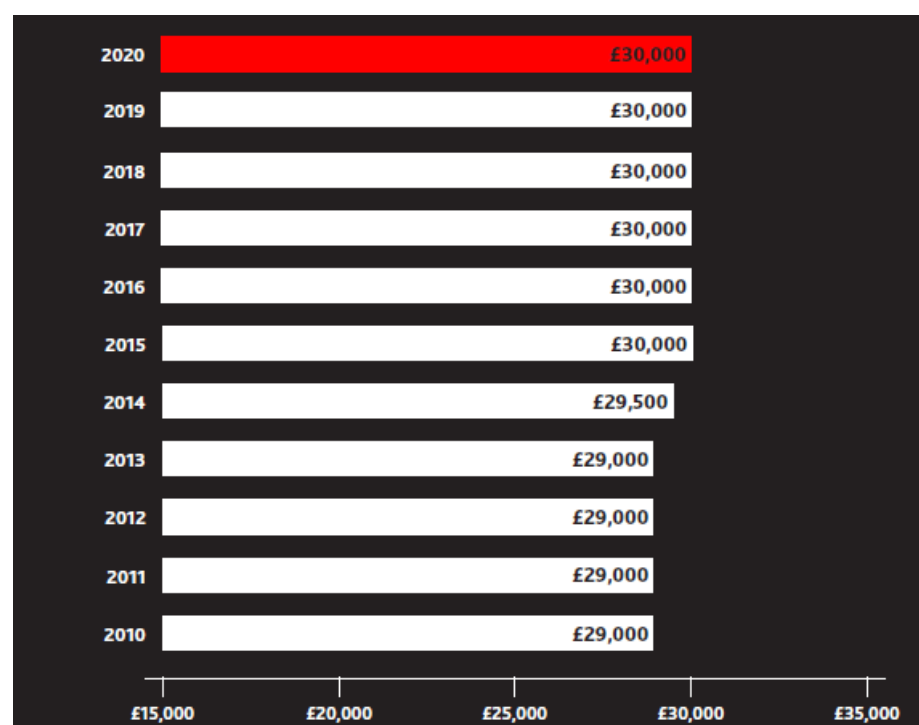
Source: High Fliers, 2020
(N.B. Figures do not include additional compensation)

Hospitality management graduate salaries average £20,000 - £22,000. This falls significantly short of the UK national average of £30,000. With at least a sixth of organisations on the High Fliers list of top graduate programmes now providing starting salaries of more than £40,000 (High Fliers, 2020), this further suggests the need for industry to address the salary gap if they wish to attract and retain talent.

4.3 Trends in Graduate Destinations

For hospitality management graduates, the top three areas they worked in were marketing, sales and PR (29.7%), other occupations (15.3%) and retail, catering, waiting and bar staff (13.5%) as seen in Figure 10. This supports the divergence of hospitality management graduates into wider industries.

Figure 10: Type of Work for those in Employment - Hospitality Graduates

Arts, design and media professionals	1.3%
Business, HR and finance professionals	8.5%
Education professionals	1.1%
Engineering and building professionals	0.2%
Health professionals	0.4%
Information technology professionals	0.7%
Legal, social and welfare professionals	1.4%
Managers	9.9%
Marketing, PR and sales professionals	29.7%
Science professionals	0.0%
Other professionals, associate professionals and technicians	5.9%
Childcare, health and education occupations	1.4%
Clerical, secretarial and numerical clerks	10.6%
Retail, catering, waiting and bar staff	13.5%
Other occupations	15.3%
Unknown occupations	0.1%

FEMALE: 1,865 / MALE: 765 / TOTAL IN EMPLOYMENT IN UK: 2,635

Source: HECSU, 2018

For business graduates, the top three types of work are business, human resources and finance professionals (26.4%), marketing, sales and PR professionals (21%) and managers (12%) as seen in Figure 11. Yet, retail, catering, waiting and bar staff does account for 9.8% of those in work suggesting that business/management graduates have developed the necessary skills to work in hospitality through their degree and that they are a talent pool that is utilised by the industry. It also indicates that hospitality is seen as an attractive prospect perhaps due to the diversity in roles and flexibility in work that is now so often desired by the younger generations.

Figure 11: Type of Work for those in Employment - Business/Management Graduates

Arts, design and media professionals	1.0%
Business, HR and finance professionals	26.4%
Education professionals	0.9%
Engineering and building professionals	2.1%
Health professionals	0.2%
Information technology professionals	2.9%
Legal, social and welfare professionals	1.5%
Managers	12.0%
Marketing, PR and sales professionals	21.0%
Science professionals	0.2%
Other professionals, associate professionals and technicians	3.9%
Childcare, health and education occupations	1.1%
Clerical, secretarial and numerical clerks	9.6%
Retail, catering, waiting and bar staff	9.8%
Other occupations	7.2%
Unknown occupations	0.1%

FEMALE: 5,575 / MALE: 6,295 / TOTAL IN EMPLOYMENT IN UK: 11,865

Source: HECSU, 2018

Many graduates from other degree areas rate highly working in the retail, catering, waiting and bar staff category; especially in the creative arts, humanities, sciences and social sciences with the above category being the number one job outcome for those that studied sociology.

Figure 12: Degree Type of Graduates Working in Retail, Catering, Waiting and Bar Staff
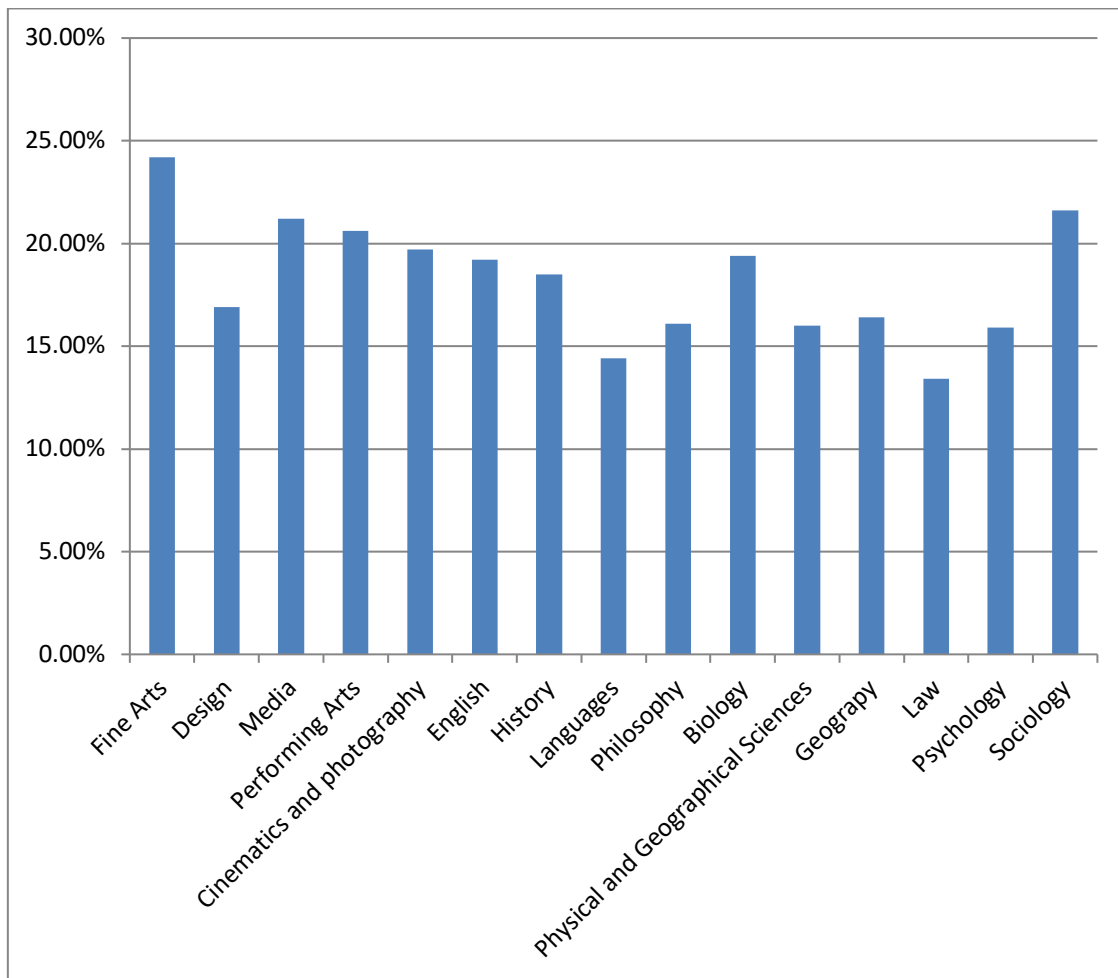
Source: Adapted from HECSU, 2018

Such findings in Figure 12 could suggest that, in a similar fashion to hospitality degrees, these degree courses also develop higher levels of soft skills such as emotional intelligence which are identified as key skills for working in the service sector. Overall, there is a reiteration of the fact that hospitality management graduates are entering into more generic business roles upon graduation as well as hospitality roles. Despite the results from the benchmarking of graduate roles suggesting hospitality employers are valuing hospitality degrees and experience; these findings suggest that the hospitality industry, although combined with retail, is also recruiting graduates from alternative degrees.

To understand the picture of graduate employment further, it is also valuable to take a longitudinal perspective on those that work within the hospitality industry. Figure 13 shows

that only 21% of those that were in the accommodation and food service activities at the start of the survey were still in the industry at the point of the longitudinal assessment (2002-2013). Thus, prompting the need for industry to both look at attraction and retention in the industry.
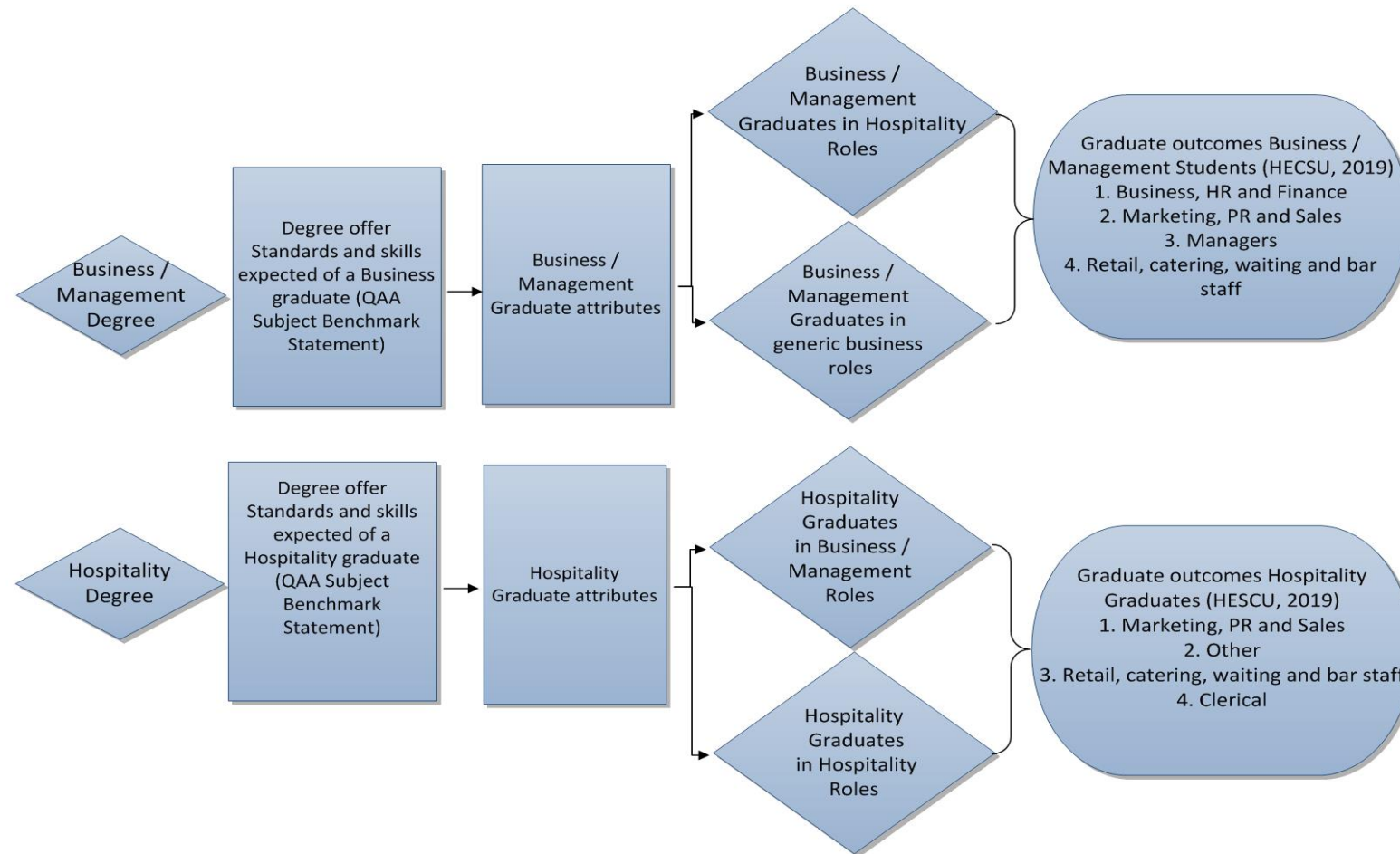
Figure 13: UK Domiciled Leavers 2012/13 in Employment
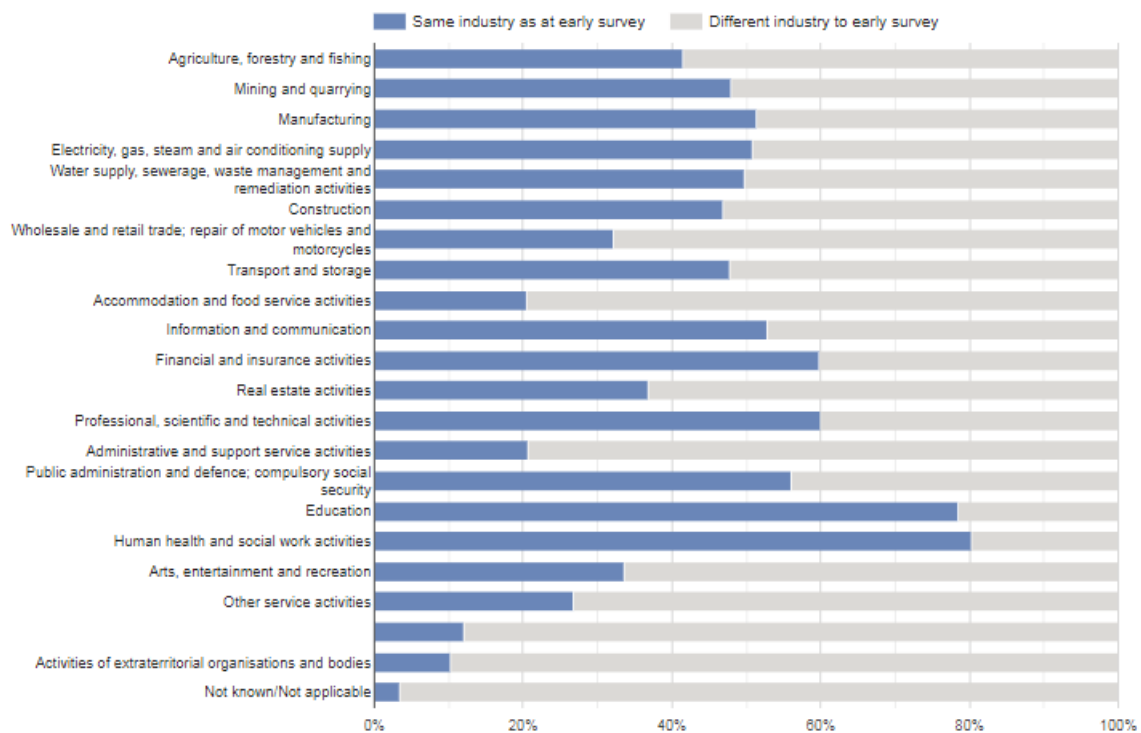
Source: HESA, 2018

From the information presented in this section 4, is possible to build a more detailed picture of the flow of students through the student cycle and the graduate destinations as depicted in Figure 14.

Figure 14: Student Cycle

5. Opportunities for Hospitality Management Education

Higher education providers should continue to invest in hospitality management education
The data shows that the decline in enrolments in hospitality management education courses is stabilising and actually on the increase. Trends in hospitality management education cannot be considered in isolation from other related subject areas (e.g. tourism and wider business management). From the overall analysis (see Figures 2 and 3) these courses have also experienced a decline but they are now regaining their foothold. The decline in hospitality management education may also be attributed to cannibalisation due to perceived similarities of the teaching and learning experiences gained from other courses.

We need captains of industry. These are hospitality business leaders with influence. HE providers and industry must continue to work together to strengthen and deliver more innovative work experience opportunities and ensuring current industry needs are reflected in the curriculum.
Hospitality management courses must retain strong industry connections and continue to strengthen this element whether it is through feeding into course design and course material or offering work placements. Industry is indeed collaborating and supporting HE through offering ways such as work placements, guest lectures, site visits, advice on curriculum development and being part of an institution's advisory board. Such approaches need to continue but also become more embedded in to the curriculum. Captains of industry would support this by championing the value of hospitality management education. This will also help to combat the image issue.

Hospitality management education courses should reflect a balance of technical/vocational and business/management knowledge, skills and abilities.
The hospitality industry is complex in terms of its diversity, structure and operations. To be successful in this industry, graduates require specific knowledge relating to the idiosyncrasies of the industry and the curriculum must reflect this. These industry specific skills should be developed in consultation with industry and continuously revisited to ensure their future

requirements will be met and graduates will be industry-ready. The hospitality components of the course should be evident and this should be coupled with the required expertise in business/management.

Professionalisation of the hospitality graduate

Professional bodies can play a stronger role in strengthening the role and value of hospitality as a profession especially for graduates and ensure this professionalisation is being recognised by industry. This would add value and credibility to hospitality as a career of choice. These professional bodies can work collaboratively with higher education and industry in setting the standards, guidance and requirements for hospitality management education which helps to shape the design of courses and ensure a talent pipeline. In the UK, the professional body statuses of other disciplines are well-recognised and accepted by industry such Accounting, Human Resources and Management. For example, The Chartered Management Institute offers the established Chartered Manager professional qualification which states that a Chartered Manager can improve business revenue by £62K each year.

Promote the complexity of the hospitality industry as an attractor for new generations of learners

The structure of the hospitality industry is complex. For example, the hotel sector is characterised by ownership, franchise, leasehold, management contracts, joint ventures or any combination of these. This is coupled with a large number of SMEs, family owned businesses and the use of third-parties and agencies for sub-contracting and outsourcing. This complexity has created a myriad of agents and relationships which might be attractive to our changing learners.

Strengthen the hospitality industry job offer

To have a strong talent pipeline, the hospitality industry job offers needs to be attractive and have a comparative offer with those of other industries. This will improve the image and add value to the hospitality offer.

6. Conclusions

Overall, our findings have identified that enrolment in hospitality management courses in the UK is steadying. The data from the selected countries in Europe display a mixed picture of steady growth, decline or stability and therefore it is difficult to identify any key comparative trends. The perception of the industry is changing slowly and there is indeed more co-operation between higher education and industry. However, such partnerships need to be nurtured and developed further beyond the traditional offer to provide more innovative ways of collaborating to change existing perceptions of the industry and champion hospitality management as a choice for education and a career.

The industry also needs to reflect on its job offer and how it can become more competitive in attracting talent. UK hospitality management graduate programmes pay less and require at least 12 months' work experience as compared to business and management graduate programme which offer more pay and require less work experience. However key opportunities exist through further professionalisation of the field and reflecting the complex structure of the hospitality industry. These can be exercised in attracting future students in supporting the hospitality talent pipeline.

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8. Appendices

Appendix A: Benchmarking Criteria

	QAA Hospitality, Tourism, Leisure, Events	QAA Hospitality	QAA Business and Management
Overview	The events, hospitality, leisure, sport and tourism (EHLST) subject grouping encompasses courses of study aligned closely to the service sector and experience economy. The subjects contained within the EHLST grouping share many common principles, approaches, values and priorities, as well as having distinctive characteristics as separate subjects A feature of EHLST as a subject grouping is the application of this body of knowledge to a professional, practice-based context. Interaction between employers and higher education providers is a fundamental part of courses in EHLST	Hospitality degree courses often involve study of the following: • the nature of hospitality as an area of academic and applied study • the management of technical operations, such as food and beverage, and accommodation • the management disciplines within the context of hospitality • the hospitality industry and its global environment, including issues of sustainability and the use of technology • the hospitality consumer and the service encounter • career development and learning opportunities in the hospitality sector. Most courses approach the study of hospitality with an emphasis on leadership and business management.	Business and management honours degree courses which are broad based and general in their scope rather than being oriented towards a particular business function (for example, marketing or finance) or sector (for example, tourism or construction management). However, it can also be used to inform a wide range of provision, including those focused on business functions or sectors, in relation to broad aspects of business and management.
Purpose of degree		Hospitality degree courses often involve study of the following: • the nature of hospitality as an area of academic and applied study • the management of	The purpose of business and management courses is threefold: • increasing understanding of organisations, their management, the economy and the business

	EHLST subjects are particularly sensitive and responsive to changes in the world environment. This is reflected in the increasing inclusion in degree courses of opportunities for students to consider the issues of internationalisation, environmental sustainability, ethical positioning, social responsibility and social justice, global security and risk, crisis management and other contemporary issues. The role of technology, and the increasingly digital and mobile nature of society, is also significant. EHLST as a subject grouping is well placed to inform the global debate and identify future areas of challenge.	technical operations, such as food and beverage, and accommodation • the management disciplines within the context of hospitality • the hospitality industry and its global environment, including issues of sustainability and the use of technology • the hospitality consumer and the service encounter • career development and learning opportunities in the hospitality sector. Leadership, innovation, entrepreneurship and the management of food, beverages and/or accommodation in a service context. The defining characteristic of any course is the study of the management and technical disciplines relevant to hospitality within this context. Provision of hospitality education stems from a vocational focus. Courses in hospitality have evolved significantly beyond this vocational focus to combine technical, management and scientific disciplines as a coherent whole, while retaining strong connections to industry	environment • preparation for and development of a career in business and management • enhancement of a wide range of skills and attributes which equip graduates to become effective global citizens.
Standards and skills expected		Graduates should be able to demonstrate: research skills, critical analysis, creativity, work independently and with others, take and demonstrate proactive responsibility,	Graduates should be able to demonstrate knowledge and understanding in the following areas: Markets, Marketing and Sales, Customers, Finance, People -Management, Organisational behaviour, Operations,

		recognise and respond to moral, ethical, sustainability and safety issues	Information Systems and Business Intelligence, Communications, Digital Business, Business Policy and Strategy, Business Innovation and Enterprise development, Social responsibility
Expected graduate attributes		An honours graduate in hospitality is able to: critically analyse and evaluate the defining characteristics of hospitality; evaluate and apply, within the hospitality context, appropriate theories and concepts from generic management; analyse and evaluate the business environment and its impact on the hospitality industry; use technical and interpersonal skills and knowledge to propose and evaluate practical and theoretical solutions to complex problems; recognise and value the centrality of the hospitality consumer and meet and respond to their needs; identify and respond appropriately to the diversity that prevails within the hospitality industry	Graduates should be able to demonstrate relevant knowledge and understanding of organisations, the business environment in which they operate and their management. Courses emphasise understanding, responding and shaping the dynamic and changing nature of business and the consideration of the future of organisations within the global business environment, including the management of risk.