

**Analysis of Public and Private
Post-Secondary Tourism and Hospitality Programs Inventory
January 18, 2005**

Background

In December 2004, with the creation of Provincial Centres of Innovation and Leadership for Tourism and for Hospitality, a project was initiated to provide up-to-date information on the number of graduates from public and private tourism and hospitality programs.

Go2 contracted Geoffrey Bird to conduct a research project during December with the aim of completing the task in time for the January Consortium meeting. What follows are the results of this project.

Methodology

A similar inventory project was conducted in 2002 as part of the Tourism People Development Planning Initiative. Therefore, the starting point for the 2004 inventory was the original list of programs and data from 2002. Several changes however were made to the categories and overall approach to data collection.

- All major career-related tourism related and hospitality programs were included in the study. Short continuing education type programs were not included.
- For the private institution listings, accredited programs were separated from non-accredited programs. The intention here was to minimize the issue of comparing programs that did not share a common level of quality and standards.
- Non-accredited programs are not included in this inventory. A request for data was made by both email and phone. Many of these non-accredited institutions did not feel comfortable in sharing their data, or did not bother to respond to emails and phone calls. As a result, the non-accredited data collection is not reliable and therefore has not been added.
- Rather than collecting data related to capacity of each program, the researcher requested total number of graduates for the 2004 calendar year. The researcher believes that this gives a more accurate portrayal of what is happening in the province.
- The data collected represents the total number of student graduates rather than full time equivalents (FTEs). This allows for the data to be compared between public and the private institutional numbers.
- An issue in the 2002 inventory was the number of international graduates enrolled in private, as well as public, post secondary programs and whether the graduate numbers get inappropriately inflated as a result. The researcher collected the data on this, although in many cases institutions offered only a general estimate. For this study, the researcher has interpreted international students as leaving Canada upon graduation.

- An email was sent to contacts in all of the public and private programs. Overall response from public and accredited private institutions was 100% of public

institutions responded, and 16 of 21 institutions responded representing 77 of 85 programs listed (roughly 90% of private programs in total).

- As most programs do not focus on specific occupational training, except for cook training, the programs are presented in 5 program groups:
 - Hospitality Management
 - Cook Training (entry level)
 - Tourism Management
 - Travel Programs: ACCESS (ACTA-CITC Canadian Educational Standards System) related programming
 - Adventure Tourism

A Note on Data Limitations

- This is one year's worth of graduates and as such may not reflect an institution's normal graduate level.
- Considering graduates as 'supply' for the labour market is not advised for the following reasons:
 - some graduates continue with further studies (e.g. degree);
 - others are already working during the program (part and full-time);
 - others may leave the province to travel or to work;
 - other graduates opt for another industry;
 - Tourism has a weak labour market, meaning that education and training does not align with a specific job entry point, or salary. Therefore, one cannot say a management degree graduate will necessarily become a manager;
 - For cooks and chefs, about 18% of the total demand for cooks and 14% of the total demand for chefs is from sectors other than tourism. Therefore, we cannot assume that the number provided above is moving directly into the tourism industry.
- The data on the number of international graduates gives a sense of how many are coming to study but the majority of which will ultimately leave Canada. The researcher can say anecdotally that a large number opt to stay for an additional year of work, of which some immigrate to Canada.
- Graduates may be from a certificate, diploma or degree level program, making it difficult to identify a common standard for certain program groupings. For example, what is the common skillset for a tourism student or an adventure tourism student? With this said, caution should be taken in using this data as the 'supply' to meet labour market demand for certain management or supervisory occupations.
- There is also still some difficulty in comparing private and public programming as they are substantially different curricula and program duration.
- The researcher was unable to calculate the difference in graduates between 2002 and 2004, since capacity was measured in 2002 and the 2004 numbers indicated the number of graduates. The researcher believes that the number of graduates provides a clearer picture of what is happening in the province.

However, collecting the capacity of programs may have been useful in assess ongoing challenges with recruitment.

- Tourism and Hospitality program groupings for the private tourism programs are not as consistent in their content as one might want. The researcher has used his own judgment and the opinion of the institutions themselves to position various programs.

Number of Graduates for 2004: Number Aggregated for all Education and Training by Program Groupings / Occupations

| Program Group | Public Graduates | Intern'l Graduates | Private Graduates | Intern'l Graduates | Total |
|----------------------------|-------------------------|---------------------------|--------------------------|---------------------------|--------------|
| Hospitality | 320 | -29 | 519 | -80 | 730 |
| Tourism | 396 | -29 | 271 | -22 | 616 |
| - Flight Attendant | N/A | N/A | 61 | -15 | 46 |
| Adventure Tourism | 170 | -5 | 108 | -19 | 254 |
| EL Cook Training | 1048 | -10 | 405 | -92 | 1351 |
| Cook Appren. Lev. 3 | 142 | N/A | N/A | N/A | 142 |
| Baker Appren. Lev 3 | 24 | N/A | N/A | N/A | 24 |
| Travel Counselling | 71 | 0 | 470 | -69 | 472 |
| Total | 2171 | -73 | 1834 | -297 | 3635 |

General Findings from the Research

- There were approximately 3635 graduates in 2004 (minus international graduates).
- There are 79 listed programs in 16 public post-secondary institutions
- The public post secondary programs graduated 2171 people of which 73 are international (minimum 2098 potentially staying in Canada).
- There are a total of 85 programs in 21 accredited private post secondary institutions.
- The private post secondary programs graduated 1834 people of which 297 are international graduates (minimum 1537 potentially staying in Canada).
- All of the public post secondary programs in the group of hospitality and tourism are management related.
- Overall, there is an increase in the number of programs in the public post secondary system from 2002. There are at least 6 new programs listed, with first graduates expected between 2005-2007. However, three travel programs and at least one adventure tourism program were cancelled.
- Anecdotally, there is a decrease in the number of tourism and hospitality related programs in the private post secondary institutions. Comments from institutions, specifically smaller ones, were that there was not a strong demand for some of their programs. In other cases, institutions have consolidated their offerings.
- Approximately 15% of private programs are part-time, with approximately 25% of public programs are full-time.
- Approximately 6% of private graduates are coming from programs outside the Lower Mainland.

- For public institutions, only Kwantlen, Fraser Valley, Langara and UBC do not offer tourism related programming. Approximately 50% of all public graduates are coming from programs outside the Lower Mainland.
- In the public programs, there is a province wide common core curriculum used for Diploma programs. In the private programs, standards vary in terms of program duration and curriculum, although the vast majority uses the American Hotel and Lodging Association curriculum (AHLA). This difference greatly reduces and even mitigates the ability for graduates to transfer from the private to the public post-secondary system. As well, the skillset of graduates of the public and private systems, although given the same credential (e.g. a diploma) is not the same.
- The non-accredited private institutions offer a range of programming, from bartending to introductory adventure tourism. Their graduates also represent people interested to committing to a career in the industry, yet the challenge is the interest of such institutions in becoming formally credible in their offerings by becoming an accredited institution, and wanting to collaborate to the benefit of the industry as a whole. It is hoped that data will be forthcoming from these institutions in the near future.

General Findings for Public and Accredited Private Post Secondary Programs

What follows is a general analysis by broad program grouping, subdivided into public and private programming.

Tourism (Public)

- There are 29 tourism related programs, of which 8 are certificates, 13 are diploma and 5 are undergraduate degree and 3 are graduate and post graduate.
- The number of graduates for 2004 for certificate, diploma and degree programs is 396, of which approximately 29 are international students.
- There are three new programs that will provide graduates in 2005, totaling 48. These are not included in the 2004 calculations.
- All programs are full time, although some have a part-time option, ladder to degrees, and follow a provincial common core curriculum (except for graduate and post graduate).

Hospitality Management (Public)

- There are 14 hospitality related programs, of which 2 are certificate level, 9 are diploma and 3 are undergraduate degree.
- The number of graduates for 2004 in the certificate, diploma and degree programs is 320, of which approximately 29 are international students.
- There are two new programs that will start intake in 2005, with graduates in 2007. In addition, VCC will also be increasing its intake of students from 80 to 180 starting in 2005. These are not included in the 2004 calculations.

- All programs are full time, although some have a part-time option, articulate provincially and follow a provincial common core curriculum.

Adventure Tourism (Public)

- There are 11 adventure tourism related programs, of which 9 are certificates, and 3 are diploma.
- The number of graduates for 2004 in the certificate and diploma programs is 170, of which approximately 5 are international students.
- There is one new program that will have 15 graduates in April 2005. These are not included in the 2004 calculations.
- This program grouping offers a wide range of skillsets, with various industry certifications and academic standards used depending on the program focus.

Cook Training (Public)

- There are 11 institutions involved in entry-level cook training. In addition, there are 2 baking programs and one retail meat-processing program.
- The total number of graduates for 2004 is 1048, of which 10 are international.
- A new culinary program will start in 2005 based in Maple Ridge.
- Several institutions have implemented special programs with local school districts, resulting in high school students receiving cook training at the College.
- In 2004, there were 921 apprentices, of which 520 did not take technical training during the year. Ninety-five graduated from Level 1, 164 from Level 2 and 142 from Level 3. For baking, there are 95 apprentices, with 27 in level 1, 8 in level 2 and 24 completing level 3 this year. Thirty-nine did not take technical training this year.

Travel Programs (Public)

- There are 3 colleges involved in travel counselling certificates
- The total number of graduates for 2004 is 71, with no international students.
- This program grouping has seen a decrease in programming since 2002, with 3 programs no longer offered in the province.

Accredited Private Post Secondary Programs

Tourism (Private)

- There are 16 tourism related programs, of which 8 are certificate level, 10 are diploma
- The number of graduates for 2004 in the certificate and diploma programs is 271, of which approximately 22 are international students.
- In addition, a subgroup was created called Flight Attendant, which has 3 diploma programs, totaling 61 graduates of which 15 are international.
- This grouping is a mix of introductory tourism skills (ESL for tourism, guiding) and management programs.
- The duration of certificate and diploma programs varies from institution to institution.

Hospitality (Private)

- There are 40 hospitality related programs, of which 15 are certificate level, and the rest are diploma/higher diploma.
- The number of graduates for 2004 in the certificate and diploma and programs is 519, of which approximately 80 are international students.
- The most common curriculum (and also leading to certification) found amongst this program grouping is provided by the American Hotel and Lodging Association.
- The duration of certificate and diploma programs varies from institution to institution.

Adventure Tourism (Private)

- There are 7 adventure tourism related programs, of which 1 is a certificate level, 5 are diploma and 1 is an undergraduate degree.
- The number of graduates for 2004 in the certificate, diploma and degree programs is 108, of which approximately 19 are international students.
- The duration and curriculum for each of these programs varies.
- A separate listing is provided for the Canadian Avalanche Association, which provided training to 400 people in 2004, of which 60 were international. As there are many associations offering specific and required certifications, further research could occur in this area. As these training sessions are relatively short, the large number of graduates distorts the number of graduate for career related programs. Consequently, it has been left out of the aggregate numbers.

Cook (Private)

- There are 7 cook related programs, of which 5 are certificate level and 2 are diploma.
- The number of graduates for 2004 in the certificate and diploma programs is 405 of which 92 are international students.
- The culinary programs differ from the public in their curriculum, as well as duration.

Travel (Private)

- There are 10 travel related programs, of which 5 are certificate level and 2 are diploma.
- The number of graduates for 2004 in the certificate and diploma program is 470, with 69 internationals.
- The travel related programs follow the CITC/ACCESS standards.

The Secondary School System Career Preparation

Total Secondary Students in Tourism 2003/2004

Secondary schools provide training related to tourism in grades 11 and 12. The Ministry of Education provided the following data:

| | |
|-------------------------|---|
| Tourism 11: | 1767 students (8% increase from previous year) |
| Tourism 12 | 1581 students (24% increase from previous year) |
| Tourism Career Program: | 621 students |

The Ministry indicates that there is an increase from 2002/2003. The reason for the increase is unclear. Perhaps it is owing to an increasing number of students enrolling in career related courses, a restructuring of course offerings, the growing profile of tourism, or that there is a degree option available to students. Further study is required to ascertain the reason for the growth. How many of these secondary school students continue into the industry or to post-secondary tourism and hospitality programs is also not known.

What can be said is that, anecdotally, many post-secondary tourism students first learn about the tourism hospitality programs from secondary school counselors. Clearly, the secondary school system represents an important opportunity to influence student decision-making towards tourism.

Conclusion

In reviewing the data collected, one may ask whether public and private institutions are meeting labour market demand, or to what extent they are not. Clearly, this question was not the focus of this research but rather only serves as one piece of the information required to answer the training gap question.

Another question that might be asked is if the province needs more programs. The researcher did receive some anecdotal comments that particularly private institutions had terminated tourism related programs, as there was not the student demand for them. On the public side, and again anecdotally, some programs in rural areas are finding it difficult to maximize their intake, with some institutions even opting to skip a year's intake all together. However, certain institutions are at full capacity with waiting lists, and others are launching new programs or increasing the size of their intake. Geographic location and student preference may be the reason for this, but further research would be required this finding. Again, answering this question with the information from only this study is not possible.

Tourism and hospitality graduates are under the potential guidance and tutelage of the tourism industry while they are committed to a given tourism /hospitality program. Upon graduation, they are out and on their own, perhaps leaving the province or moving to another industry. At that point, the opportunity to guide the graduate into a successful

career in the tourism industry is lost. One could say that the graduate is now essentially on her own: her success and staying power in the crucial few years after graduation rests on the experience she has in the industry, and the choices she makes.

Previous studies have shown significant attrition of tourism/hospitality graduates after a few years out in the tourism workforce, a situation where these once committed individuals are lost perhaps owing to lack of direction, opportunity or some other incentive to stay. In order that the so-called training gap between supply and labour market demand is not even larger than expected, it is essential that care be taken to mentor and support these students that have already committed to a career in the tourism industry. Attracting more students is also important, but to miss out on the opportunity to nurture those already committed to tourism may be critical to keeping them with the tourism industry.

Addendum: Inventory of Tourism and Hospitality Graduates of Private Non accredited Post-Secondary Institutions

This addendum will analyze the:

1. number of graduates of private non-accredited post-secondary programs in tourism-hospitality;
2. Aggregate number of graduates for public, private accredited and private non accredited tourism and hospitality programs.

Background

The first part of this project focused on the public post-secondary, apprenticeship and private, accredited institutions. As an addendum to the original contract, analysis of the private non-accredited programs was requested. These are private institutions that are registered with Private Career Training Institutions Agency (PCTIA) but have not gone through the accreditation process.

Whereas registering as a private post secondary institution is mandatory, accreditation is voluntary. Accreditation is a quality assessment process used as a precondition for student loan designation and eligibility for some other government programs such as student loans. In addition, and as stated on the PCTIA website, “many institutions seek accreditation because it is a benefit to both students and the institution to go through an external quality assurance process”. (www.ppctia.bc.ca)

Non-accredited institutions were not included in the first round of data collection, as there were concerns as to the ability to measure quality of programs and facilities. However, private non-accredited programs represent a segment of training that some tourism career-minded students are choosing.

An institution may not choose to undergo the accreditation process for a number of reasons. Primarily, if their programs are shorter (and therefore not eligible for government assistance) or if their target student demographic (ie international students) does not qualify for government assistance, there may be no perceived need to undergo what is a costly and onerous process.

For the purposes of this inventory, it should be noted that the accreditation process serves as a means of quality assurance, and if we are to appropriately recognize the quality of graduates from non-accredited institutions, some kind of validation of programs in tourism and hospitality should be considered. Furthermore, such validation would assist in facilitating collaboration between public and private post-secondary institutions in areas such as course credit transfer to higher levels of tourism related education.

Students who are interested in pursuing training in the private sector should be encouraged to visit the regulatory body's website (www.pctia.bc.ca) to review the differences between "registered" and "accredited".

Methodology

Data was collected with the help of Julia Peters, the private post-secondary representative on the Provincial Consortium for Tourism and Hospitality Education, and Director of Education for Vancouver Premier College of Hotel Management, and Monica Lust, Executive Director of the BC Career Colleges Association. Owing to the reluctance among private institutions to share data with competitors, Julia and Monica were enlisted to help solicit institutions to provide the data. It was also agreed that names of institutions would be omitted from the database, as a way to get involvement.

The non-accredited institutions were asked the same information as the public and private accredited institutions. A list of non-accredited institutions offering tourism and hospitality programming was created using the PCTIA website. An email was sent out requesting information, and then phone calls were made to the remaining institutions.

A Note on Data Limitations

- All of the data limitations listed in the main part of the report are still valid and need to be taken into consideration.
- The list of non-accredited institutions created from the listings on the PCTIA website had some inaccuracies, with some institutions listing programs when they were not offering them. As some institutions did not return phone calls, it is unclear whether the non-respondents were not offering tourism and hospitality programs, or if they simply did not want to share their information.
- Beyond looking at the title of the program, there is no other screening as to the validity of the programming: no analysis occurred of curriculum, instructor qualifications or facilities.
- The program groupings used here mirror the main report, but with the addition of bartending.

From the list of institutions on the PCTIA website, there are about 44 that appear to offer tourism or hospitality related programs. The data below represents the responses from 11 institutions of the 44 that were contacted. Of the original 44, 9 did not offer tourism and hospitality programs last year, thus bringing out total sample to 35. In total, 11 institutions responded, representing 17 programs. As mentioned above, many of the non-responding institutions had voicemail and opted not to return the call: it is unclear whether the other 26 institutions are offering any tourism and hospitality related training. It should be noted that it was difficult to collect data from these institutions, presumably because of a reluctance to share information with perceived competitors. For education and training to evolve to further benefit students and employers, it will be important to ensure the involvement of all institutions in this kind of activity.

Number of Graduates for 2004: Number of Graduates from Private Non Accredited Programs by Program Groupings / Occupations

| Programs | Total Graduates | International students | Totals by Grouping |
|---------------------------|-----------------|------------------------|--------------------|
| Hospitality Related | 118 | -60 | 58 |
| Bartending | 400 | 0 | 400 |
| Adventure Tourism Related | 7 | 0 | 7 |
| Culinary Related | 364 | -111 | 253 |
| Total | 889 | -171 | 718 |

General Findings from the Research

- Of those that responded, the private non-accredited post-secondary programs graduated 889 people in 2004, of which 171 are international graduates (minimum 718 potentially staying in Canada).
- Of the total number of graduates, 45% of graduates are from bartending (400) and another 41% are from culinary related training. The bartending program, typically between 40-60 hours in duration, may skew the data somewhat in relation to total numbers of graduates, since most of the other programs are anywhere from several months to two years in duration.
- The non-accredited programs had a total of 35% of its total graduates that were international, higher than both the public and private accredited programs.
- Nearly all of the private non accredited programs are full-time.
- Except for 2 institutions, those that responded were in the Lower Mainland.
- In the private programs, standards vary in terms of program duration and curriculum, although the vast majority uses the American Hotel and Lodging Association curriculum (AHLA). This difference reduces and may even mitigate the ability for graduates to transfer from the private to the public post-secondary system. As well, the skillset of graduates of the public and private systems, although given the same credential (e.g. a diploma) may not be the same.

The non-accredited private institutions offer a range of programming, from bartending to introductory adventure tourism. Their graduates also represent people interested to committing to a career in the industry, yet the challenge is the interest of such institutions in becoming formally credible in their offerings by becoming an accredited institution, and wanting to collaborate to the benefit of the industry as a whole.

Combining Public Post-Secondary, Private Accredited and Private Non Accredited Programming.

The overall intention of this study, both this addendum and the main report, is to ascertain the number of graduates in order to assist in assessing the extent of the training gap, defined as the difference between labour market demand and existing graduate supply. As was mentioned previously and repeated here for further

emphasis, considering graduates as 'supply' for the labour market is inaccurate and is not advised for the following reasons:

- some graduates continue with further studies (e.g. degree);
- other graduates are already working during the program (part and full-time) and are therefore not available to fill the labour market need;
- others may leave the province to travel or to work;
- other graduates opt for another industry;
- Tourism has a weak labour market, meaning that education and training does not align with a specific job entry point, or salary. Therefore, one cannot say a management degree graduate will necessarily become a manager.
- It is unclear whether employers are recognizing the graduates' credential as good enough to hire the individual.

Given these reasons, one must consider how these totals can be used in a valid and reliable manner.

At its most basic level, these totals represent the total number of people that have made a commitment to a job or a career in tourism and hospitality. This in itself has significance, as we now have a strong indication of the number of individuals who are choosing to invest time and money into a career in the tourism industry. However, other uses of this data, specifically tallying up the total number of graduates in such a varied set of programs, both in subject, content, duration and arguably in quality, should result in considerable debate.

Number of Graduates for 2004: Number Aggregated for all Education and Training by Program Groupings / Occupations (Public and Private, Accredited and Non Accredited)

| Program Group | Public Grads | Intern'l Grads | Private Grads Accred. | Intern'l Grads Accred. | Private Grad Non-Accred | Intern'l Grads Non-accred | Total |
|----------------------|---------------------|-----------------------|------------------------------|-------------------------------|--------------------------------|----------------------------------|--------------|
| Hospitality | 320 | -29 | 519 | -80 | 118 | -60 | 788 |
| Bartending | | | | | 400 | 0 | 400 |
| Tourism | 396 | -29 | 271 | -22 | 0 | 0 | 616 |
| - Flight Attendant | N/A | N/A | 61 | -15 | 0 | 0 | 46 |
| Adventure Tourism | 170 | -5 | 108 | -19 | 7 | 0 | 261 |
| EL Cook Training | 1048 | -10 | 405 | -92 | 364 | -111 | 1604 |
| Cook Appren. Lev. 3 | 142 | N/A | N/A | N/A | 0 | 0 | 142 |
| Baker Appren. Lev 3 | 24 | N/A | N/A | N/A | 0 | 0 | 24 |
| Travel Counselling | 71 | 0 | 470 | -69 | 0 | 0 | 472 |
| Total | 2171 | -73 | 1834 | -297 | 889 | -171 | 4353 |

Analysis

- There are 4353 Canadians or Landed Immigrants who graduated from public, private accredited, and private non accredited tourism and hospitality programs in 2004. In addition, there were 541 international students who graduated from these programs.
- Of this total (4353), the number of graduates from public and the sum of accredited and non-accredited is almost equal.
- Looking at the total number of Canadian or landed immigrant (ie. not international) graduates provided by each type of programming, the breakdown is as follows: 48% from the public, 35% from the private accredited programs, and 16% from the private non accredited programs.
- The private post-secondary institutions, both accredited and non accredited, graduated 2700 in 2004, of which 468 were international students.
- The largest program groupings for graduates are: cook training, hospitality and tourism, making up 73% of the total number of graduates in the province (sum of hospitality, tourism, EL cook training, cook appren, Baker appren.)
- The private post-secondary institutions provide virtually all of the Bartending and Flight Attendant training, equaling 446 graduates, which equals roughly 10% of the total number all tourism and hospitality public and private graduates. In addition, the private programs represent 75% of all travel counseling graduates.
- Education and training in areas beyond the Lower Mainland rests primarily with the public institutions, as roughly 90% of all private institutions offering tourism and hospitality are found in the Lower Mainland.
- With regard to adventure tourism programming, approximately 65% of training is provided by public institutions.
- On the whole, private institutions tend to offer shorter programs than the public institutions.

Conclusion

This addendum serves to provide an analysis of the private non-accredited programs, as well as the total aggregate number of graduates from the three sources of tourism and hospitality education and training: public, private accredited and private non-accredited programs.

With regard to the private non-accredited programs, they are 718 graduates in 2004. These graduates represent 16% of the total number of graduates of all the tourism and hospitality programs in the province. This portion may be larger, given the response rate, although it is difficult to estimate. This number includes bartending and culinary related training, representing 90% of the number of graduates.

Using graduate numbers as 'supply' to meet industry's labour needs would not be a valid and reliable use of the data for several reasons. However, this data does give policy makers a general sense of those that are committed to tourism and hospitality from a career perspective. Given the issue of quality assurance, further research and discussion is warranted on credentialing, curriculum standards and the success of

graduates, possibly with some kind of validation of programs in tourism and hospitality developed or adopted.