Miller **RESEARCH**

Cardiff Catering

Scoping Study

Final Report

to

ELWa

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Miller R E S E A R C H

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Summary

 Introduction and context

▪ The hospitality sector accounts for approximately 4% of GDP across the UK, employing a total of more than 1.6 million people. In Cardiff alone, it is estimated that there are more than 700 hospitality businesses and the sector is set to enjoy continued expansion as new facilities such as the proposed £700m International Sports Village in Cardiff Bay are completed – complementing other recent high profile developments such as the Millennium Stadium, existing Cardiff Bay regeneration and the Millennium Centre.

▪ However, the industry suffers from both skills and labour shortages, partially as a result of perceptions of long and unsocial hours, poor working conditions and low pay. For example, Of the 3,800 waiters and waitresses working in the SE Wales region, almost 75% were engaged on a part-time basis, with an average wage of just £80 per week.

▪ Identified skills shortages are mainly for skilled chefs and hotel / restaurant managers, whereas labour shortages are more likely to be apparent for waiters / waitresses and kitchen assistants.

▪ Enrolments on school and college catering courses have been steadily falling over a prolonged period, latterly in favour of new disciplines such as sports science.

▪ Employers state a preference for training in the workplace and are reluctant to release staff for off-site training, beyond basic health and safety / food hygiene training, which is a quasi-legal requirement.

▪ Cardiff CCET has identified Catering and Hospitality as a key sector for development and wishes to improve learning provision for the industry, especially with respect to FE provision in the City.

 Current Learning Provision for Catering and Hospitality

▪ **FE Provision** - During 2001/2 a total of 620 SE Wales domiciled students attended full-time catering and hospitality courses – most of them at Further Education Colleges within the SE Wales region. However, only 3% of these (21 students) were able to pursue their aim in the Cardiff area – at Coleg Glan Hafren.

▪ **Work-Based Learning Provision -** There were in addition almost 300 SE Wales domiciled work-based learners, mainly pursuing NVQ2 qualifications as chefs/cooks, catering assistants or waiting staff. A smaller number were taking bar staff or restaurant manager qualifications. The Hotel and Catering Training Company (HCTC) was the most prominent provider, responsible for almost 70% of completions.

▪ **School Provision -** A number of secondary schools in the Cardiff area under the banner of Coleg Glan Hafren, who manage and capitally invest in the training restaurant at the Willows High School. This catering training centre is open to students from other schools and Coleg Glan Hafren, under the Collegium partnership arrangement.

Stakeholder Views

▪ Approximately twenty stakeholders and learning providers were interviewed face to face. The results reflect previously published findings that the industry suffers from low pay, unsocial hours, poor career progression and a negative image held by job seekers, parents, careers advisers, teachers and employees within the sector.

▪ A summary of the issues raised is given below:

Current Overview

- Fragmented provision makes it difficult to identify progression routes through the industry.
- Progression beyond level 2 is difficult unless supported by an employer.
- There is no access to catering learning for non-employed women returners, the unemployed or those already in full-time education.
- Employers welcome the development of the credit framework, which will allow increased provision of short and customised courses.

Recruitment and Retention

- Stakeholders agreed that perceptions of employment in the industry remain poor, despite the high-profile media attention given to celebrity chefs.
- The industry is seen to be a "two speed" sector, with high quality hotels and restaurants providing good training and conditions for chefs and managers, contrasting with the reality for the relatively unskilled, low-level jobs in food preparation, sales or managing microwaveable fast food outlet operations.
- Marketing by employers can help to improve perceptions, but a co-ordinated strategy is needed to combine co-ordinated marketing with high quality training and visible career progression through the industry.
- The current position is a vicious circle of poor industry image leading to low quality candidates and consequently low employer expectations of their staff.

FE Provision and Recruitment

- Coleg Glan Hafren manages the Collegium with Cardiff schools and has developed a successful partnership with schools. The College has provided investment for a

training restaurant at Willows High School, where post-16 students can pursue catering studies under a franchising agreement.

- Employers are perceived to view colleges as being too rigid in their approach and not able to tailor programmes sufficiently to employers' particular needs.

- For their part, FEIs may need to develop their off-site provision, supporting more delivery and assessment in the workplace.

School Provision and Recruitment

- Partnership developments are working well under the Collegium system, but uptake of opportunities remains limited, despite good quality facilities such as those at Willows High School.

- Academically able pupils are dissuaded from vocational options by both school and parents. The introduction of vocational A Levels has yet to make an impact.

- There is limited provision for 14-16 year olds, although the LEA in Cardiff is working to develop collaborative vocational options.

Work Based Learning -Provision and Recruitment

- Current work-based learning provision may be out of step with employer needs – especially in terms of delivering foundation and basic skills elements.

- Time to study is also an issue, perhaps especially for managers in the hospitality sector – leading to low levels of progression onto higher qualifications.

- Current provision is seen as too rigid and driven by economies of scale.

Recruitment and Retention

- Labour shortages are reported across all occupations, with skills shortages for key occupations.

- Work readiness is also an issue and this ties in to current delivery of work experience / work placements, which are seen as unstructured and often inconvenient to the employer and of little value to the student.

- It was acknowledged that non-nationals provide a potential source of recruits for the industry, but that provision such as language training needs to be in place to capitalise on their availability.

- Several stakeholders felt that the former Hospitality Bank of part-time and temporary workers of the industry should be reinstated.

Employer Survey

▪ 102 employers across the hospitality sector were interviewed on a range of factors relating to skills, recruitment and business development. Results are summarised below:

▪ More than 60% of the businesses interviewed were independent and 40% were individually owned. Linked to this was the result that training and recruitment decisions were made at the Cardiff business site in almost 80% of cases.

▪ Businesses were most likely to employ chefs/cooks and managers. However, in terms of numbers on each site, bar staff, waiters / waitresses and receptionists represented the most employees.

▪ Twenty-two percent of those interviewed had experienced recruitment difficulties during the last year, with higher proportions of restaurants, hotels and larger businesses experiencing difficulties. More than three-quarters of all recruitment difficulties related to full-time positions.

▪ The main reported reasons for hard to fill vacancies were a lack of the required skills, personal and social qualities or relevant experience. The main skills said to be lacking were customer care, communication skills and food preparation and cooking.

▪ In terms of skills gaps, 88% of employers were satisfied with the current skills of their employees. Of those who recognised a skills shortage, the majority felt that it was amongst their chefs / cooks and especially in the areas of food hygiene, food preparation and cooking. In addition, kitchen management, customer care and the ability to develop staff were mentioned.

▪ Skills gaps were manifested through lower levels of customer service and increased costs.

▪ Almost 20% of businesses trained no staff last year, and one third had trained less than 25% of their staff in that time. Forty-six percent had arranged some training for all their staff. More than half of all employers felt that their current levels of training were adequate.

▪ On the job training was the most common approach to delivery, usually provided by a member of staff. Those using an external provider were most likely to use someone based locally.

▪ Short courses were the most popular means of accessing learning, followed by mentoring and part-time courses. Health and safety, food hygiene, food preparation and customer care were the main subjects accessed.

- Half of all employers felt that NVQs fitted well with their training needs and a significant balance of employers agreed that college leavers are generally work-ready, whereas school leavers are not.

- Almost 60% of employers agreed that their training is driven by legislation, especially those in the pub/bar business sector.

- A significant majority of those interviewed supported the idea of businesses getting together to share training.

- Three quarters of employers expect growth in the catering and hospitality market over the next year.

Best Practice From Other Regions

- **Belfast -** The Tourism Training Trust is an Independent body sponsored by the Department for Education and Learning. Gaps in training resource are identified and the organisation develops new innovative approaches, for example a new Chef Development Programme which is currently being piloted. It sub contracts all provision and signposts learners to these providers.

- **Dublin -** Failte Ireland was created from the merger of Board Failte (Tourist Board) and CERT (Training Body for Tourism). It enjoys significant ongoing investment from the Irish Government (approx €20-30M). All skills issues relating to hospitality and catering are referred/managed by the organisation. All training for individuals is free and there are no eligibility criteria other than those claiming benefit that cannot opt for a full time course. Non-nationals are supported in learning under the initiative. A number of Return to Work programmes are run directly by Failte, aimed at women returners, carers and other disadvantaged groups.

- **Glasgow -** Tourism People Scotland (TPS) has developed 'Pride And Passion' - a comprehensive programme of mentoring, ambassadorial and buddying work for the industry, with a move away from traditional training. A key success factor has been the fact that TPS is Industry led.

- **Bristol -** Catering and hospitality in the Bristol area shares many characteristics with Cardiff in terms of growth and redevelopment. A Tourism Task Force was set up for Bristol and the surrounding area, with an initial set up budget of £70,000. This was seen as a successful approach and the initiative has now grown to encompass all seven counties in the South West region. There is a significant range of activity supported under the initiative, from

management development programmes to teacher involvement in curriculum development, vacancy bulletins on the Network website and targeted marketing activity.

Conclusions

- Skills and labour shortages are present in the catering and hospitality sector in Cardiff, but they are not recognised across all businesses or all occupations.

- It should be recognised that there will be a significant proportion of lifestyle or part-time businesses in the sector, which may have no plans to expand their business or recruit new staff. In addition, many businesses employ unskilled, part-time staff such as students, who are currently in plentiful supply.

- There is a significant difference between the needs of full and part-time staff. Background research suggests that part-time staff are more likely to be satisfied with their job and have lower expectations of training or progression. The employer survey showed that 75% of hard to fill vacancies in Cardiff were for full-time posts. Hence it may be these areas that merit most attention, as it is these that exhibit most recruitment difficulties, but may also be where effort can bring about lasting effect.

- Skills shortages are most noticeable for key staff, such as chefs/cooks and managers. Labour shortages are more common for waiters and waitresses, catering assistants and chefs/cooks.

- Levels of training are comparatively low across the sector, yet more than half of all employers feel that their current level of training is adequate.

- Training is heavily driven by legislation, especially in the pub / bar sector, implying that restaurants and hotels may be more proactive about developing their staff for the sake of business aims.

- Current provision for catering training in Cardiff is lacking in terms of further education and fragmented in other areas. Work-based learning is heavily private-sector led and some practical approaches to delivery have been developed by partnerships of employers and private training providers.

- Some pockets of good practice have been developed, such as the catering training facility at the Willows High School. These are further enhanced through the shared access allowed under the Collegium initiative.

- Whilst it is acknowledged that the industry needs more skilled entrants and ongoing development for existing staff, it has not been clear what form the relevant provision should take.

▪ It is unlikely that a training restaurant or hotel would provide a viable means of addressing the issues. Employers voice a preference for training in the workplace and are reluctant to release staff for training off site.

▪ A network approach is likely to offer a more successful means of meeting industry need. By bringing together interested employers, providers and relevant support agencies, a virtual training academy can be established. Subject to sufficient funds being secured, this could offer a mix of provision in different settings, offered to employers on the basis of actual identified need and in circumstances which fit with the smooth and effective running of their business.

▪ Sixty percent of employers expressed support for the idea of businesses getting together to share training, implying theoretical support for a network approach.

Recommendations

▪ Bring together all parties with an active interest in learning in and for the catering sector in Cardiff, to investigate the creation of a training association. This would need to be employer led, but would be supported and facilitated by the public sector and possibly hosted by the CCET. It would also need to bring together the existing but currently unconnected initiatives that are being developed by a number of agencies and partnerships across the sector. If successfully established, the association would develop a coordinated strategy for developing the sector in Cardiff, incorporating:

- Employer-led training, commissioned to meet identified need
- Joint marketing of the sector to potential entrants
- Improved relationships between industry and education, including school visits, taster sessions for interested students and working with Careers Wales to provide enhanced work experience and work placement. Mentoring could also be used to develop individuals showing particular interest or promise.
- A strategy to roll out awareness of the need for training, from a nucleus of committed employers within the association, to their less enlightened colleagues elsewhere.
- Joint applications for external finance, to fund short courses and other identified needs of the group.
- A co-ordinated approach to providing underpinning knowledge, from age 14 to adult, involving all provider sectors and including clear progression routes.
- Bringing food education into the curriculum through developing materials for inclusion across existing subject areas.
- Harnessing existing talent, especially amongst chefs, to introduce a mentoring scheme for employees and students at all levels.

- Organise a moderated workshop session for all interested parties to discuss the above and other conclusions of this report. Attendees should include major employers and training providers, along with members of the CCET and other potential stakeholders.

- Investigate methods of converting part-time staff in the industry into full-time employees. In most cases this will require being able to demonstrate a valid and transparent career path, along with attractive packages of pay and conditions.

- Improve access to catering learning for labour market returners and the unemployed. Support Jobcentre Plus in subsidising employers to take on and train new entrants or returners.

- Strengthen ESOL provision for members of ethnic minority communities or non-nationals wishing to enter the catering and hospitality sector. This should include technical vocabulary relating to industry basics, such as health and safety, food hygiene and food preparation, as well as customer service.

- Increase demand for learning by marketing to employers the links between developing skilled staff and increasing profitability.

- Investigate supply-chain approaches to delivering a learning message to Asian and Oriental restaurant businesses. By working with relevant suppliers, it may be possible to access non-traditional learners in a culturally sympathetic manner.

- Build on the Collegium principle to develop shared access to existing facilities for the wider community. Subject to access constraints, arrange community taster sessions in catering learning, with the potential to progress onto mainstream learning programmes.

- Examine the delivery of management and entrepreneurship training for catering students, given the fact that 60% of businesses surveyed in Cardiff were independently owned.

- Visits to South West of England, Scotland and Dublin are highly recommended. These areas have seen significant investment by the Governments (They have realised the major risk in not investing), and have all had high levels of employer involvement and leadership. They have all had a dynamic involvement from a partnership made up from the Public Sector, and a lead organisation (usually the Tourist Board or an independent arm of the Tourist Board, engaged in driving forward the activities within the plans.

- Revisit the Hospitality Bank concept, to determine whether the facility could be reinstated.

1   Introduction to the Research

Background and Rationale

1.1   In recent years, Cardiff has striven to establish itself as a European capital city and tourism destination for business, sporting, cultural and heritage visitors.

1.2   The City has enjoyed substantial levels of infrastructure investment through high profile developments such as the Millennium Stadium, Cardiff Bay regeneration and the Wales Millennium Centre and this is set to continue with headline projects such as the forthcoming Sports Village.

1.3   All of these projects imply employment growth in the tourism and hospitality sectors and this is likely to put further pressure on an already tight labour market in Cardiff. The catering sector across the UK has reported skills and labour shortages in a number of key occupational areas – perhaps most notably amongst skilled chefs, and this could potentially limit the scope of the benefits to be gained from further tourism investment.

1.4   Despite the rise of the chef as a celebrity, the hospitality industry as a whole has acquired a relatively unattractive image amongst potential recruits, characterised by perceptions of low wages, unsocial hours, part-time working and high staff turnover. This has led to falling enrolments and applications for catering courses in Further Education (and in schools), with students opting instead for subjects which appear more attractive.

1.5   Cardiff CCET, as part of its annual recommendations, identified a need to further understand the vocational training needs of the sector at levels 1-3. The CCET also expressed a wish to investigate the most effective means of delivering the required skills to meet the identified needs of employers.

1.6   Subsequently, ELWa appointed Miller Research (UK) Ltd to investigate the issues affecting the catering sector in the Cardiff area and the provision of skills to the industry. This report lays out the initial findings of this work.

Aim & Objectives

1.7   The original specification for the research states the aim of this project as:

"To review the skills needs of the catering industry in Cardiff, comparing provision against learner needs and employer needs."

1.8   The objectives of the research include:

▪ Determining whether there is a shortfall in the provision of training at levels 1-3 in the catering industry to meet the current and forecast needs of the sector, taking into account the development of Cardiff as an events city.

▪ Assessing whether the level of demand for training from trainees will match the demand from the sector in terms of job opportunities.

▪ Exploring perceptions of the sector amongst potential workers.

▪ Consider how changes in delivery might best be effected – including a review of outline proposals for a multi-partnership training development.

▪ Ensuring that the particular skills and training needs of the ethnic minority community are identified.

Approach

1.9 **Background research and mapping.** The first stage of the project consisted of identifying and mapping the extent of current provision of post-16 catering skills across Cardiff, in its wider context.

1.10 **Stakeholder interviews**. This element of the research comprised a series of face to face interviews with learning providers and other key stakeholders from agencies with an interest in learning provision for the sector in Cardiff.

1.11 **Employer survey.** In order to access a relatively wide spread of opinion across the range of catering employers in Cardiff, a telephone survey of 100 hospitality employers was carried out by Beaufort Research Ltd. Interviews were held with the manager responsible for business decision making and recruitment, using a questionnaire designed in collaboration with the project Steering Group. Each lasted 15 to 20 minutes. Sample for the survey was drawn from the Cardiff County Council employer database

1.12 **Benchmarking with other growth destinations.** A selection of other, comparable cities with a record of infrastructure growth was examined, to identify best practice in developing catering provision under similar circumstances.

1.13 **Analysis and Reporting.** Finally, the outputs from the preceding elements have been combined to deliver some conclusions and a potential model for developing catering training provision in the Cardiff area.

2   Background to the Sector

Introduction and Context

2.1   In recent years, the catering sector across the UK has reported skills and labour shortages in a number of key occupational areas – perhaps most notably amongst skilled chefs.

2.2   Despite widespread popular media attention and increased public interest in food issues and dining out, the catering sector is still generally perceived to be an unattractive industry to work in.

2.3   Recent figures from the Hospitality Training Foundation (HtF) show that the industry across the UK employs just over 1.6 million people and accounts for roughly 4 percent of GDP. In 2001, however, 51 percent of unfilled vacancies for hospitality jobs remained unfilled. The position is made worse by the fact that since 1999/2000 there has been a drop of 3,343 students enrolling onto hospitality programmes in colleges across England alone.

2.4   Recruitment of skilled chefs is a particular issue for the industry. In 2003, there were 5,906 vacancies for chefs notified to Job Centres out of a total of approximately 265,486 working in the UK - or nearly 2.5 percent of all chefs.

2.5   Other research into the sector in Wales[1] highlights the effects of issues such as poor quality work experience, a trend away from traditional catering courses to more attractive areas such as sports nutrition and consequent falling student numbers at FE level.

2.6   The catering sector in Cardiff differs from that in many other parts of Wales, in respect of a relatively high level of business and sports tourism, along with the presence of major institutions and the ethnic diversity of residents.

2.7   Recent developments such as the Millennium Stadium, the growth of Cardiff Bay and the forthcoming opening of the Millennium Centre will all impact on the demand for catering skills and are likely to ensure that both the recruitment and retention of skilled staff remain an issue for employers over the medium term.

2.8   Latest data from the Labour Force survey shows some 5,250 chefs and cooks working on the SE Wales area, at an average wage of £180 per week. Of the 3,800 waiters and

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[1] For example *"Hospitality employment and skills forecasting for Wales",* Miller Research and MRUK for HtF, 2001.

waitresses working in the region, almost 75% were engaged on a part-time basis, with an average wage of just £80 per week.

2.9   Although there is a relatively high level of in-house training in the sector, much of it is likely to be at a basic level, in response to due diligence or legislative requirements. Cardiff CCET, as part of its annual recommendations, has identified a need to further understand the vocational training needs of the sector at levels 1-3 and wishes to investigate the most effective means of delivering the required skills to meet identified needs.

Background Research – Lessons from Existing Materials

Importance of the industry

2.10   A study carried out in 2000 identified 3018 hospitality businesses in South East Wales[2] – with particular strengths in terms of restaurants and pubs, clubs and bars.

Figure 1 Breakdown of Hospitality Businesses in South East Wales
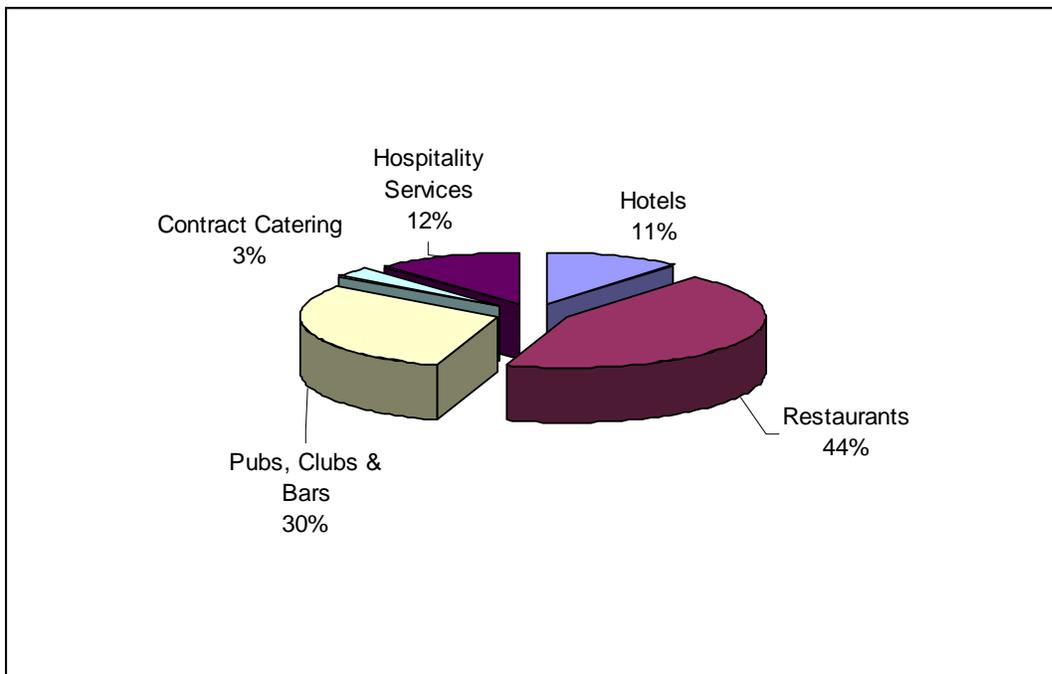
Source: HtF 2000

2.11   South East Wales accounted for 18% of all hotels identified in Wales, with a higher than average proportion of bed and breakfasts, guesthouses and budget hotels and slightly under-represented in both luxury and mid-range hotels.

2.12 The Cardiff serviced accommodation demand study[3] estimated that, in 1997, there were 131 serviced accommodation establishments with 2,985 bedrooms in the Capital.

- A 22% increase in supply was forecast by 1998.
- Demand for serviced accommodation was expected to rise by 31% to 2002.
- Forecast levels of supply and demand would require a total of 400-600 additional serviced accommodation rooms by 2002.

2.13 The HtF work found that the restaurant sector in South East Wales has a higher proportion than average of coffee bars (9%) and "fast food or takeaways" (49%).

2.14 The hospitality services sector in the region caters for the retail sector to a larger extent than elsewhere in Wales, accounting for 31% of businesses in the sub-sector.

Figure 2 Hotel Sector in South East Wales, by Type of Establishment

Source: HtF 2000

Recruitment and Retention

2.15   The industry suffers recruitment and retention problems of demand exceeding supply
and a shortage of skilled staff in particular. Some of the issues identified by employers
interviewed in the HtF survey include:

- A lack of communication between education and industry
- The perception of the sector amongst potential job applicants.
- A need to research the perceptions and experiences of hospitality students to
investigate the high leakage rates away from the industry.

2.16   An earlier study of employee attitudes and career expectations[4] showed that part-time
employees had lower expectations of their work and tended to be more satisfied with
their hours and pay. Pubs had the highest percentage of satisfied employees.

2.17   The study also found that managers were most likely to place importance on career
and promotion and frequently specialised as a means of achieving advancement.

2.18   Those in the 20-29 age group were less satisfied with regard to promotion, training
and qualification opportunities. Employers believed the main reasons for lack of retention
were unsocial hours and low pay.

Skills and Training

2.19   The main identified areas of skills shortages in the HtF study were amongst chefs and
basic operatives, but especially with regard to the supervisory and management skills of
chefs – in terms of both people management and business management.

2.20   With regard to training provision, employers felt strongly that all practical training
should be delivered in the workplace, whilst College settings could be used more to
concentrate on underpinning knowledge.

2.21   A key aspect of workplace training is that the employer should benefit from the
training as well as the staff who receive it. "*A genuinely developing organisation creates
a virtuous circle of continual development of both the organisation and the people that
work within it.*"

2.22   Particular concerns of college-based provision included:

- Students leaving college were not seen as prepared for work in the industry.

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[4] Employment in the Catering and Hospitality Industry: Employee attitudes and career
expectations (1994) HTC

- The assessment process in colleges relying too strongly on paper evidence, rather than assessing work-based competence in practice.

- Employers needing to develop more ownership of training.

2.23   Mentoring and networking were perceived to offer innovative forms of learning, such as job swapping with other organisations – which could be similar establishments or totally unrelated. Master classes, however, were not felt to be effective, as they could appear staged and hierarchical.

2.24   An earlier study for HtF[5] echoed the value of partnerships and networks between groups of small employers, providers and others at a local level.

2.25   A piece of work by members in the Cardiff CCTI[6] aimed to develop the first stage of the Learning Strategy to respond to the needs of employees and employers and to map this need against current provision in the public and private sector.

2.26   The main findings were:

- Employees must be allowed to upgrade their own knowledge and skills through training and learning

- Employers, and especially small businesses, must have the resources, skills and delivery mechanisms made available to them to deliver training.

- Learning opportunities must be diffused across all businesses as well as employees who currently have little access to learning provision.

- Education and Training Providers need to make training readily available through provision at venues and times to suit businesses. This can be supported by a variety of methods of learning style and delivery.

Case Study 1 – The Shared Chef Scheme[7]

- The Shared Chef scheme is an ELWa-Funded training initiative for the hotel and catering industry in Gwynedd. This network was established prior to 2001 and was initiated by discussions with a network of hotel owners in the Meirionnydd area. They highlighted a training need for their chefs and a desire to explore funding mechanisms to provide the public match-funding element.

- The scheme enabled the demand for a higher-level qualification in catering that had previously not been met. The industry, all participants and stakeholders generally welcomed the scheme

[5] Creating Step Change in Training Activity for Small Businesses in Hospitality Industry (1996) HTF
[6] Learning Chamber report "Towards a Learning Strategy" (2000) Cardiff Chamber of Commerce & Welsh Enterprise Institute, University of Glamorgan Business School
[7] Taken from the evaluation of the Shared Chef Initiative, Newidiem, 2004.

- This scheme has contributed to the changing perceptions amongst recruits in that the qualification gained as well as the training itself is seen to be of a very high quality. Perceptions among those entering employment in the sector were seen to be a problem in that recruits regarded jobs within the industry as poorly paid with no real career progression.
- The course was seen by students to provide relevant and practical training that could be used in their workplace from day to day.
- All trainees had in-house mentors and were given time by these mentors to consolidate their training at the college.
- The scheme benefited greatly from an existing network within a sector and was a catalyst for strengthening links that already existed.
- The scheme enhanced and developed the co-operation between the industry and training providers that did not previously exist.
- Students felt that the training had improved their capabilities as chefs and their confidence and sense of job satisfaction. The hoteliers believed that the improvements as a result of their chef's training had had a positive impact on their business's profitability. The area as a whole would benefit as it upgraded the skill pool of students and improved quality in the hotels restaurants could potentially attract more customers.
- Retaining staff was not the main consideration of the scheme. However, hoteliers felt that the skills students acquired were a direct benefit to their business and being able to retain those skills for longer periods was therefore an additional benefit.
- The scheme met the demand for a more relevant and appropriate training which was not seen to be available previously.

Education Industry Links

2.27   Employers interviewed as part of the HtF work felt strongly that there was a need to improve the status of kitchens and catering in schools and to avoid catering being viewed as a low-status option.

2.28   One employer called for a 3-day per week programme of industry placement from the age of 14. This would include high quality craft training and would effectively present an alternative (and truly vocational) curriculum.

2.29   Employers admitted that many work experience students were given menial tasks, little variety and no training. This led many school and college students to lose interest in the hospitality industry, following a bad experience of work placement.

2.30   A 1998 report for CHME[8] stressed the importance of education industry links, in a series of recommendations based on comparisons of international approaches:

- o   Develop the link between quality training and education and productivity.
- o   Adopt best employment practices and monitor staff satisfaction.
- o   Convert "first jobbers" into "long term careerists"
- o   Help small businesses improve their practices
- o   Facilitate flexibility
- o   Encourage good employment practices.

2.31   A 1997 feasibility study for a Hotel School in Cardiff noted the importance of teaching marketing, costing and information technology as well as traditional cuisine techniques. The study also confirmed that employers are happy to have underpinning knowledge and technique taught in a classroom setting, but that work-based competence developed through practical experience was vital for new entrants to be truly work-ready and of value to the industry. (See Case Study below).

Case Study 2 A Hotel School for SE Wales?

Study of Hotel School Models – Wales Tourist Board (1997)[9]

The purpose of the report was to provide information on hotel schools with a view to having a centre of excellence for hospitality and tourism training in Wales based on a training establishment operating a fully functional hotel.

- The study highlighted the potential for a Hotel School model for a centre of excellence in SE Wales.
- The location would ensure large numbers of visitors and potential students from outside Wales and the UK
- Commitment by the industry would be central, to support and continue funding.

Future Hospitality educational developments could be summarised as:

- The "hands on" component of education and training components is important.
- "It is less important to have a competency delivered in an on-site training facility than it is to have a practical work experience in it"
- Many hotel management schools place great emphasis on the traditional culinary arts and dining-room service whilst ignoring the revolutionary changes in marketing and information technology.

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[8] In the world of hospitality…. anything they can do, we can do better (1998) CHME
[9] Study of Hotel School Models (1997) Wales Tourist Board

- Criticisms of other international hotel schools have been that the instruction approach places emphasis on producing excellent cuisine and service without adequately teaching the costing and marketing techniques.
- An overhaul of the physical learning environment is needed to bring the education and training elements of the industry up to current technological speed.
- Hospitality educators must undertake a reform of their curriculum to ensure quality human resources and deep knowledge of operational aspects of the industry.
- Emphasis on creative skills is needed, and also developing a multi-cultural approach to business operations

Case Study 3 The Emirates Academy – Chefs in the 21st Century

This programme provides an extremely attractive but cost effective means of delivering advanced management skills to experienced chefs and outlet managers. Under the tuition of internationally known chef Willi Elsener, students from the UK attend a five-day course in Dubai looking at all aspects of effective restaurant management. Course units include:

- Menu planning and development
- Understanding food cost and profitability
- Identifying and controlling wastage
- Sales and marketing
- Setting and achieving standards

The programme depends for its success on a team-learning approach, with peer to peer knowledge transfer and sharing of ideas and best practice.

Costs are subsidised by the Dubai Government, which recognises the benefits of creating international networks of chefs at this level and of linking such networks into the growing hospitality sector in the Middle East.

3   Current Funded Learning in Catering and Hospitality

FE Provision

3.1   Data from ELWa for 2001/2 shows a total of almost 16,000 students pursuing Further Education qualifications in food, hotel and catering subjects. Of these, almost two-thirds were taking food science and technology courses.

3.2   Of the hospitality-related courses, catering services was the most popular, followed by food and drink services and general hotel / catering subjects.

Table 1 Distribution of Food, Hotel and Catering Learning, Wales 2001/02

SUPERCLASS	Grand Total
Baking/ Dairy/ Food & Drink Processing	19%
Catering Services	6%
Cookery	4%
Food Science/ Technology	64%
Food/ Drink Services	3%
Home Economics	0%
Hospitality Services	1%
Hotel/ Catering (General)	3%
Grand Total	15,843

Source: ELWA, 2003

3.3   A total of 620 SE Wales domiciled students attended full-time catering and hospitality courses – most of them at Further Education Institutions within the SE Wales region.

Table 2 Catering & Hospitality Learning – SE Wales Students by FEI - 2001/02

Superclass	Aberdare College	Barry College	Bridgend College	Coleg Glan Hafren	Coleg Gwent	Coleg Powys	Coleg Sir Gar	Deeside College	Merthyr Tydfil College	Neath Port Talbot College	Coleg Morgannwg	Swansea College	Ystrad Mynach College	Total
Catering Services					230	2			56		1	23	51	363
Food/ Drink Services	41		17		1			1				25	3	88
Hospitality Services	10				3							3	3	19
Hotel/ Catering (General)	5	33	1	21	71		1			3		10	5	150
Total	56	33	18	21	305	2	1	1	56	3	1	61	62	620

Source: ELWA, 2003

3.4   However, it may be seen from the table above that only 3% of these were able to pursue their learning aim within the Cardiff area. Coleg Gwent provided the most significant levels of delivery within the sector, especially in catering services, which is not currently available in Cardiff.

Figure 3 Catering & Hospitality – SE Wales Learners at SE Wales FEIs, 2001/02
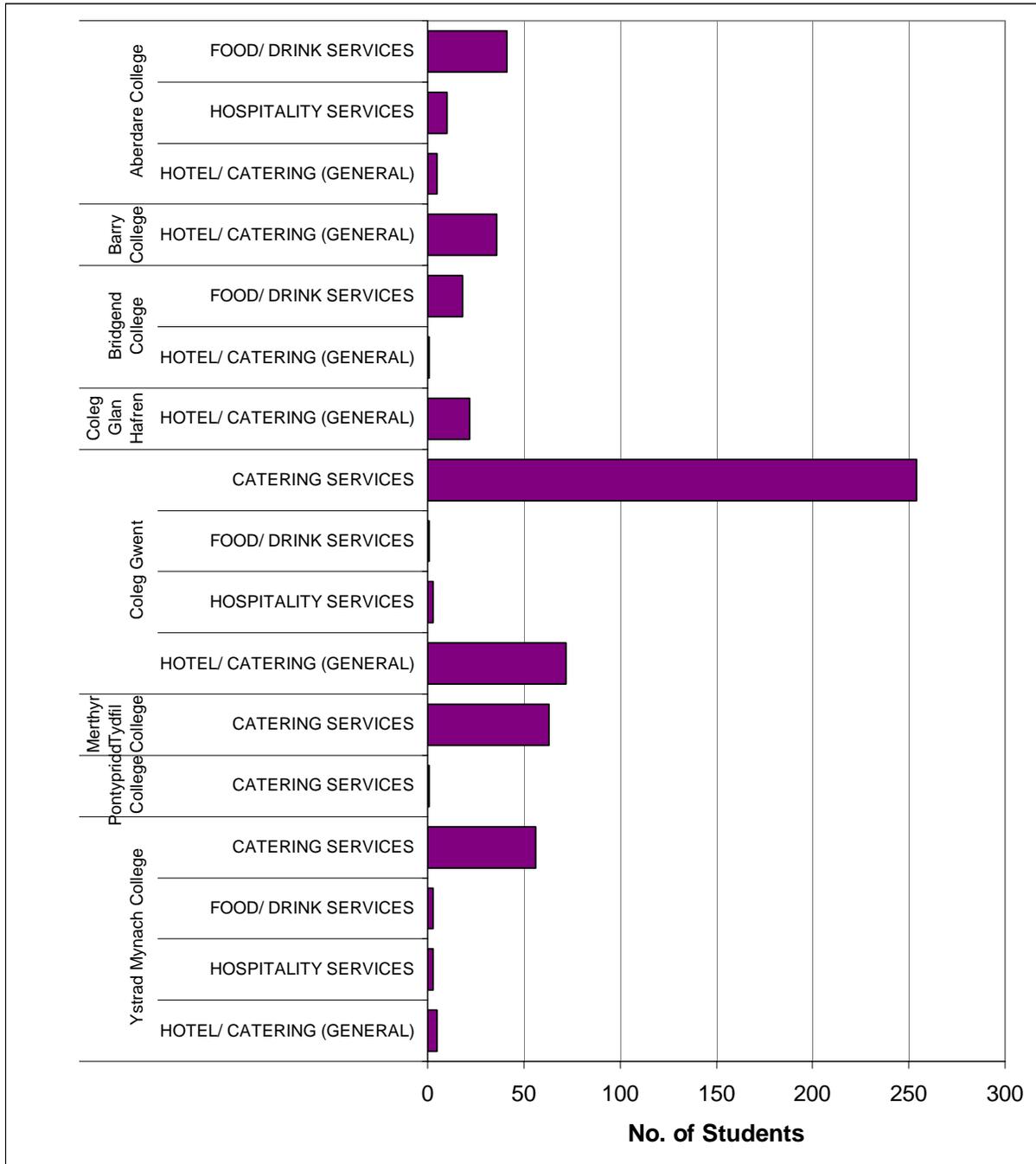
Source: ELWa, 2003

Work-Based Learning Provision

3.5   There was a total of 299 work-based learners in catering and hospitality occupations in Cardiff in 2001. The majority of provision was at level 2 and chefs / cooks provided the most significant occupational group.

Figure 4 Work-Based Learning, by NVQ Level and Occupational Route, Cardiff 2001
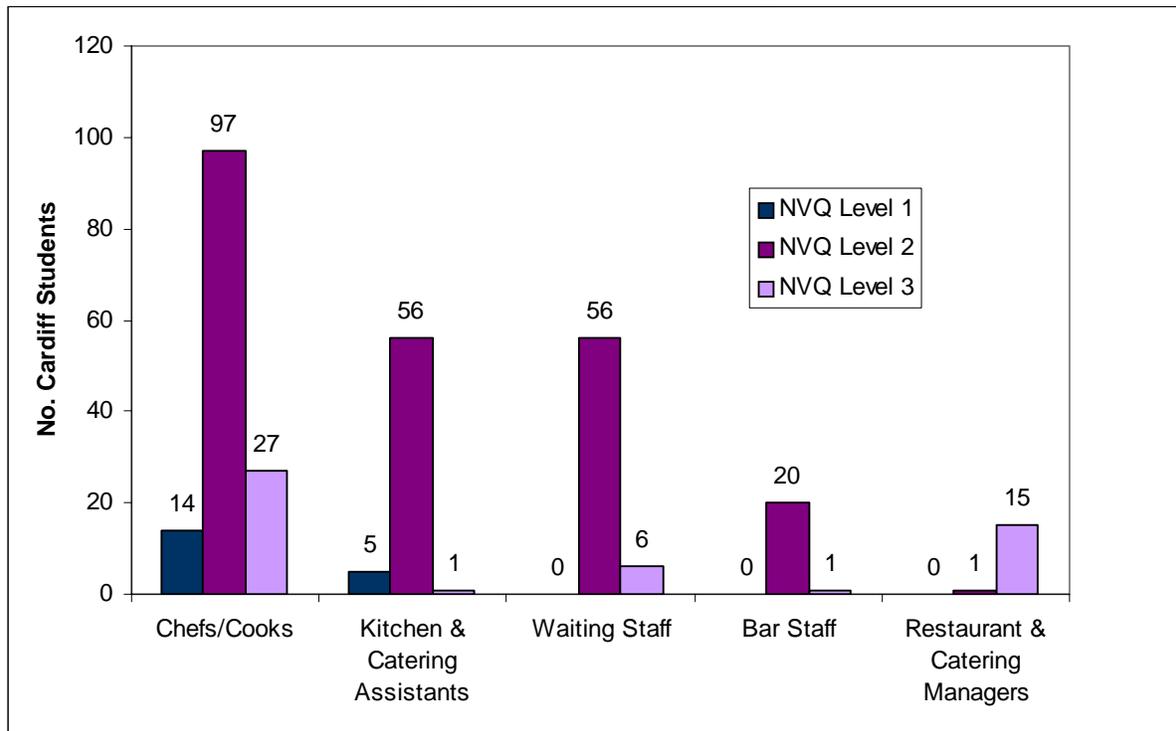
Source: ELWa 2003

3.6   The Hotel and Catering Training Company (HCTC) was the most prominent provider, responsible for almost 70% of completions.

Schools

3.7   Willows High School in Cardiff currently has a catering training centre, providing an innovative approach to delivering catering skills to younger students.

3.8   Under the Collegium initiative, this facility has been financed by Coleg Glan Hafren and post-16 students may pursue catering studies at Willows under a franchising arrangement with the college. However, there are some issues around travel and cultural resistance to students making fuller use of this facility.

3.9   Other schools with existing or developing capacity include Fitzalan, Llanedeyrn and Glyn Derw.

4   Responses from Qualitative Interviews

Introduction

4.1   Approximately twenty stakeholders and learning providers were interviewed face to face, to access a range of perspectives on issues impacting on catering learning. Particular areas of discussion included:

- The current provision for Hospitality and Catering in Cardiff

- The main pressure points in terms of skills and labour shortages

- Potential solutions to the recruitment crisis

- Potential new ways of delivering provision to meet the needs of industry and individuals.

4.2   The results of these interviews reflect previously published findings that the industry suffers from low pay, unsocial hours, poor career progression and a negative image held by job seekers, parents, careers advisers, teachers and employees within the sector.

4.3   There were generally concurring views on many of the issues but it is clear that this area is particularly complex and there are no easy solutions or one "big idea".

Current Provision

4.4   At present, due to an historical set of circumstances, learning opportunities are spread across a number of organisations, making it hard for individuals and businesses to easily identify progression routes and qualification structures relating to industry needs.

4.5   There is no centralised facility for off-site learning other than those at Barry College (FE), a small unit at Coleg Glan Hafren (FE), UWIC Colchester Avenue (HE) and Willows High School, plus a number of smaller but developing facilities on school premises.

4.6   The majority of Work Based Learning is delivered by HCTC[10] (responsible for over 70% of completions). Chamber Training and a number of other private training providers also deliver NVQs.

4.7   For the unemployed, non-employed women returners or those in full time education, there is no access in Cardiff to learning or progression in hospitality and catering other than by gaining employment and taking up a Work Based Learning opportunity.

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[10] Hotel and Catering Training Company

4.8   Many such people are unlikely to be work ready and will need the stability and support of a learning environment. Currently, they must access courses in Barry or further afield. In addition, there are no easy progression opportunities beyond NVQ level 2 unless supported by an employer.

4.9   However, current levels of provision are reported by interviewees to be sufficient due to limited demand for, or take up of, catering and hospitality courses. There is a paradox here, in that provision is available for those most likely to be affected by negative images of the sector and pressure from influencers such as parents, teachers and peers. However, there is little provision for those outside the labour market or full-time education, to whom a career in catering or hospitality may present an excellent opportunity to gain entry to employment.

4.10   The current portfolio of qualifications is being reviewed through a UK wide consultation led by the Hospitality Training Foundation (HtF). Current NVQs are reportedly out of date and need to be adapted to reflect industry trends. (Although some providers believe that NVQs are only now becoming established and to alter them again would be potentially damaging.)

4.11   It is felt however that the development of more flexible, bite sized chunks of learning through the Credit and Qualifications Framework will be a major benefit in this industry - where many employers want provision to dovetail with their own in-house training (in particular the larger hotels). With national chains such as Greene King and Marriott, providers such as HCTC can brand the training as if it is the employer's own and integrate it with any in-house delivery.

4.12   Flexibility to help fund adult training has been curbed since the re-introduction of ILAs. Eligibility has been tightened and courses such as Food Hygiene are not funded. (The rationale being that employers should pay for training required under due diligence, even when not a legal requirement) However, if funding could be identified for this kind of basic course for adults, many more recruits with the basic underpinning knowledge would be available for employment.

Recruitment and Retention in Catering

4.13   There was common agreement amongst stakeholders that the profile of the sector continues to be very poor despite the regularity of media attention, chef profiles on national television and numerous culinary programmes that draw consistently high audience ratings.

4.14   There is a dichotomy between the profile of high quality hotels and restaurants in Cardiff and the perceived image of poor working conditions within some of them. The catering industry has two diametrically opposed profiles - with the higher level skills and profile of top chefs in quality hotels and restaurants contrasting sharply with relatively unskilled, low-level jobs in food preparation, sales or managing microwaveable fast food outlet operations.

4.15   Those interviewed who have regular contact with potential recruits have conceded a lack of awareness of the opportunities available in terms of job prospects, fast track progression routes and the possibility of high earnings, travel and work that can often be fulfilling, exciting and fun.

4.16   It was felt by some interviewees that employers should take the initiative to market opportunities in the sector, supported by training providers and public sector support agencies. However, the need was identified for clear leadership and one key organisation willing to coordinate such an initiative and drive it forward.

4.17   Schools reported a willingness by employers to help promote the sector through demonstrations and presentations, but felt that a coordinated marketing strategy for careers in the hospitality sector in Cardiff is essential to make an impact at all levels. The sector needs to reinvent itself so that it is presented as a thriving industry with the potential for individuals to progress on a fast track into well-paid specialist and management careers. This would require a targeted approach, segmenting the market and appealing to the different audiences in different ways.

4.18   It was felt by some interviewees that a local approach to raising the profile of the industry should be adopted. There is a great deal of activity and attention on the sector nationally, but local people want to be able to relate opportunities and jobs to their skills and their environment. Some of the media attention is currently too far removed from real lives in Cardiff.

4.19   Local industry champions could help encourage interest in a hospitality or catering career and the use of real people as role models for the Cardiff area would stimulate demand. This would complement a proactive approach to marketing the benefits of a career in the sector.

4.20   The profile of fast food outlets and the 'snip and ping' workforce who manage microwaveable food, where there is little skill involved and no real opportunity to progress, adds to the negative, "dead end" image from which the sector suffers.

4.21   School canteens often do little to help and one school interviewee referred to the poor quality of both the food and the staff, which in turn could have a negative effect on pupils and hence reinforce the prevailing image of the industry.

4.22   Another interviewee commented on the poor quality of school-leaver candidates being steered towards the industry:

"No manners, no idea of customer care, communication or normal social skills."

This stakeholder felt that a period of study at college was vital to develop basic technical and customer care skills to be able to deal with the public.

School Provision and Recruitment

4.23   Partnership developments within the Collegium in Cardiff are generally perceived to be working well and the work already undertaken at Willows High School has been held up as a model by interviewees. However, take up is still limited, both within and beyond the school.

4.24   Negative perceptions of career prospects contribute to poor take up of learning, both at GCSE level and post-16 stage, especially when presented in the context of alternatives which are perceived to be more attractive.

4.25   Those students with the potential to achieve academically are often dissuaded from choosing a career in catering, either by parents or by the school themselves. There is a general need to market the opportunities more prominently within the Collegium network and indeed throughout all schools in Cardiff.

4.26   The continued existence of barriers to engagement and potential competition between schools is evident, particularly when faced with the choice of attending a school on the East side of Cardiff from one of the "leafy suburbs" of North Cardiff. Transport difficulties and the confidence of pupils (and their parents and teachers) to move outside their own environment add to recruitment difficulties.

4.27   Provision for 14-16 year olds is limited. There needs to be a far higher profile for, and more holistic approach to, food education in the curriculum. There is currently a very narrow perception of catering and hospitality within schools, with the majority of pupils thinking of cookery and little else. It is important to demonstrate the full range of opportunities within the industry, possibly through more tasters and promotional activity by employers for schools. This could be developed and co-ordinated through a partnership between the industry, providers and public sector agencies.

4.28   A number of initiatives are already being taken to increase awareness and encourage interest in the subject within Cardiff schools included in the research. At key stage three,

healthy eating lessons have been introduced and a number of visits by employers take place to help inspire and enlighten pupils at an earlier age.

4.29   The impact of enthusiastic teachers should not be underestimated. It was suggested that retraining of current teachers could be beneficial in order to update them with new industry trends in addition to traditional cookery classes.

4.30   The LEA schools service, which shares responsibility with ELWa for delivering the 14-19 curriculum (Key stage 4) within Cardiff, is facilitating the development of a range of vocational options for schools to share collaboratively. (ELWa has only a remit to deliver the 16 – 19 aspect of the 14 – 19 curriculum and no longer has responsibility for Education Business Links as these are now conducted by Careers Wales.)

College Provision and Recruitment

4.31   Student numbers at Barry College have been declining over the past five years, despite continuing and heavy investment in on-site facilities. (There has been a slight increase in take up this year). One third of their intake comes from the Cardiff area. Participation in the BTEC National course is declining in favour of "sexier" subjects such as Sports Nutrition.

4.32   Coleg Glan Hafren manages the Collegium with Cardiff schools and there is a real partnership approach in the way that GNVQs and NVQs are delivered, with Willows School being the centre of excellence for hospitality and catering. Glan Hafren itself has a very small amount of NVQ 1/2 and Modern Apprenticeship (MA) provision, which is declining. (No progression through to NVQ 3 this year.) There is a common timetabling project with Western side schools where pupils can choose where they want to study for certain subjects. Many decide to study away from the school environment.

4.33   Colleges are believed to be too rigid in their approach and not able to tailor programmes sufficiently to employers' particular needs. They favour a model of on-the-job training, supported by underpinning knowledge that can be delivered off site.

4.34   There is a stereotypical perception that employers believe that "Colleges have hijacked NVQs" and that they have become too academic, with not enough practical assessment of competence. Whilst there may be some truth in this, employers may not be aware of the flexibility that FEIs can now offer, for example conducting assessments on a Sunday, or offering 50 weeks a year provision with enrolments at any time.

4.35   One of the major difficulties is the disparate employer base, much of which does not easily engage with the College. Unlike the success of working with large employers in the

Aerospace Industry - where programmes were designed in conjunction with BA, British Aerospace and Dara, employers in hospitality and catering appear less willing to engage in dialogue with FE providers and appear to prefer their own in-house training, despite being offered flexibility in design and support. It is worth noting that the sector features a high proportion of micro businesses, many of which are likely to be lifestyle enterprises with little interest in training or development.

4.36   The other side of the coin is that there may be scope for FEIs to travel a little further in meeting the needs of employers – recognising the trend towards on-site learning and investigating ways of supporting this more fully.

Work Based Learning for Adults -Provision and Recruitment

4.37   According to a Job Centre Plus commentator, current demand for learning at entry level and level 2/3 is relatively low amongst their client group – hence existing capacity is sufficient, given the low take up.

4.38   There is existing scope for offering support for companies for workplace delivery, but often it is the attitude of the employer towards potential recruits that ensures take up is limited. Support is available through the recruit and train strand of Work Based Learning for Adults (an ELWa programme) however, this will cease to exist after August 2004.

4.39   Employers could benefit from adopting approaches that other sectors have followed, for example the retail sector has been successful in attracting older workers and part time workers with flexible offers of employment, which suit differing circumstances. The catering sector has been less successful in identifying and responding to its employees' needs.

Work Based Learning 16-25 – Provision and Recruitment

4.40   Current work-based learning provision may also be out of step with employer needs. Some areas of development, such as foundation and basic skills qualifications at one end of the spectrum and NVQ 4 / management qualifications at the other do not necessarily need to be delivered in a hospitality-specific course.

4.41   According to a provider for this age group, there is limited demand for entry level 1 for foundation and basic skills and these do not need to be delivered through a specific hospitality NVQ, but could be delivered via a more generic pre-vocational programme.

4.42   Time to study is also an issue, perhaps especially for managers in the hospitality sector. Managers in the industry are often significantly overstretched, and so any attempt to achieve a qualification on top of their workload is often too difficult. For example, over the past 3 years only 5 people have succeeded in gaining a level 4 qualification in hospitality with one major provider and it has taken each of them 2-3 years.

4.43   The Work Based Training opportunities offered to individuals are, of necessity, a package with little flexibility. From a provider perspective, too much diversity and individual packages of choice would require extra resourcing and hence imply extra cost. In addition, many learners move from one employer to another. With each move there could potentially be another framework with more administration and more cost.

Progression

4.44   Very few pupils who take the hospitality and catering route at school/college progress on to higher education. Unlike, for example, Health & Social Care where at least one third of students are reported to progress to study at NVQ level 4 in social work, nursing or other career options.

4.45   Progression is not simple to visualise, as there are so many different routes to follow compared with other NVQ options in some other industrial sectors. As part of a marketing approach, information should be produced as a route map to explain to individuals and employers the qualifications available and the progression opportunities they offer.

Skills shortages, labour shortages

4.46   It has been widely reported that labour shortages are evident across practically all occupations, although acute skills shortages are for chefs, kitchen staff, front of house, bar and restaurant staff and managers.

4.47   Employers are primarily looking for people with the right aptitude and attitude: enthusiastic individuals who can demonstrate the potential for good customer care, interpersonal skills and the ability to multi skill. Beyond these generic skills, core vocational skills for the industry such as food preparation are often said to be lacking in new or potential recruits.

4.48   Work readiness of Year 11 School pupils was raised as a real issue that needs to be tackled. One interviewee wished to see a change in the way work experience is delivered. At present, it generally happens during the last few weeks of term and in blocks of one or

two weeks – which may not be convenient for employers. Experience needs to be planned into courses– perhaps once a week for a period of time.

4.49   Interviewees from both schools and colleges describe some work experience placements as having a negative impact on potential recruits, and serve to perpetuate the image of the industry as an uncaring, inflexible place to work.

4.50   Responses to questions regarding the support for non-nationals were all positive as far as encouraging the supply of labour into the sector, with no major fundamental differences. It was widely felt that there should be a more accessible route for non-nationals to train, although language issues need to be addressed. Links could be made with other national strategies e.g. Basic Skills strategy for Wales and ESOL provision.

4.51   Interviewees felt that there should be scope for engaging larger numbers of non-nationals. The hospitality and catering sector could be acting to identify ways of capitalising on the work ethic of immigrants from EU accession countries such as Poland, Hungary and Lithuania.

4.52   Another interviewee acknowledged the growing role played by recruits from accession countries to the EU and emphasised the need for language training to get the most out of this group. In response to the point made by some commentators that a foreign workforce dilutes the uniquely Welsh tourism offer in Cardiff, it was suggested that there are other ways to establish a "sense of place", using Welsh music, regional menus and other cultural materials to add context.

4.53   The ESOL programme in Cardiff will require further funding in the future if immigrant workers are to be given the opportunity of filling some of the hard to fill vacancies in the hospitality sector. Demand for the programme is already outstripping supply and the intake could be doubled this year. The barriers to increasing the level of provision are capped funding and availability of accommodation.

4.54   There is a need for more short-term programmes. There used to be short courses for 'Kitchen French' for instance, where a subset of a language was taught to meet specific sector needs.

The Needs of the Ethnic Minority Community

4.55   Given the fact that Indian cuisine is now seen to provide the British national dish, it is surprising how little publicly available training is available for Indian or other ethnic cuisine.

4.56   Part of the issue may be cultural, given the strong family traditions within subsets of the ethnic restaurant sector. For example, the HtF survey[11] of Welsh hospitality businesses identified no skills or labour shortages amongst Asian and Oriental restaurants – reflecting the relative disengagement of this sector from the mainstream labour market.

4.57   However, this is likely to change as the sector matures and second or third generations of the ethnic community become involved in the sector. An example of this is exemplified by the need for a training initiative for the Asian and Oriental catering sector in Hackney. (See Case study below).

Case Study 4 – The Hackney Asian and Oriental School of Catering

The Asian and Oriental School of Catering opened in 2000 in Hackney, with help from a £500,000 grant from the EC. It works with 550 local businesses, is accredited by 5 different awarding bodies and has opened it's own training restaurant, Zen Satori. The school was set up with a view to safeguarding the skills needed to sustain the 20,000 Asian restaurants in the UK.

The main purpose of the course is to channel local people into the industry, in order to address a recruitment shortage and a skills gap in the sector. Aside from a purely vocational remit, the catering school seeks to create opportunity for children who have disaffected with traditional learning pathways such as school. With a view to helping these learners, the A&OSC is now providing vocational courses for 14 year olds from within the local educational authority.

This is seen as a way of not only improving provision of courses but also progression. The A&OSC worked in tandem with all schools and training providers in Hackney to set aside several time slots during the week for catering courses. This enables the complementary provision of both vocational and academic courses to learners whereas before, enrolment on one course would have meant neglecting another one.

This approach to learning has seen some notable successes, with previously reluctant learners being enthused and inspired by training given at the A&OCS.

4.58   One area where action is needed to help deliver catering training to the ethnic minority community is in terms of supporting those with English as a second language to develop skills to enter the mainstream labour market.

4.59   There are significant barriers to delivery in this context. For example, at Willows School there are some 17 distinct first languages spoken – implying a need for significant resources to deliver effective learning.

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[11] *Op cit*

Ways of Delivering/Innovations

4.60   Several interviewees felt that a return to the Hospitality Bank would be beneficial. This programme pre-trained people with short courses in Health and Safety, Food Hygiene, Customer Care, Welcome Host and Silver Service, creating a stock of basic technical skills. It was targeted at people looking for casual or part-time work, such as temporary workers, students, the unemployed or those returning to work.

4.61   One stakeholder suggested that the Cardiff Initiative (run by the Chamber of Commerce) could take a lead in marketing careers in catering to those not currently in employment.

4.62   There are a number of Chef schools in other parts of the UK, which could be formed into a partnership for creating a network of chefs. These could be paid to undertake demonstrations and thus create a mentoring system. The Welsh Culinary Team is a good example of this, but more innovation and more exposure is needed for the idea to have widespread impact.

4.63   The Hilton Hotel are funding a Summer School this year for seventy 16 year olds, who will experience working in a real life environment. HCTC are supporting this work experience with training sessions on food hygiene, health and safety and legislation. The funding of £30K for the Summer School will be sourced from the Hilton Foundation.

4.64   Other innovations include a 'Buddy Day', where a number of pupils across South Wales spent a day out in the industry. This is a promotion offered to schools and organised by HCTC. Taster days for pupils are organised by all the schools interviewed and the activity aims to change mindsets at an early stage.

4.65   TTFW[12] has produced 'Success through Your People' toolkit, which aims to assist employers with HRD issues, writing job descriptions, help with people development activity. They have identified 20 examples of best practice, which have been placed on a CD Rom as part of the tool kit.

4.66   TTFW has contracted Trinity College in Carmarthenshire to train staff from these best practice businesses to become mentors and to assist in spreading the word about the benefits of investing in their staff.

4.67   There is also a new website – 'WhodoIask.com' which aims to help businesses with these issues and to point them in the direction of relevant training opportunities.

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[12] Tourism Training Forum for Wales

Case Study 5 The SPICE Project - Capital Regional Tourism and UWIC

This £450,000 project supports tailor-made learning and development solutions for clusters of SMEs in the tourism industry in the Cardiff area. It has received an excellent response so far.

The learning providers engaged are usually private, as they are perceived to offer a greater degree of flexibility than colleges – which are seen by some commentators as being too rigid and not as adaptable to SME needs.

Many of the solutions are in the provision of informal or non-accredited learning, much of it short courses in areas such as legislation / due diligence, marketing or food hygiene.

5   Employer Survey Results

5.1   A telephone survey of catering employers was carried out in collaboration with Beaufort Research Limited, using the business database held by Cardiff County Council as the universe of employers.

5.2   The database identifes a total of 701 employers across the catering and hospitality sector, as follows:

Table 3 Hospitality and Catering Businesses by SIC Code, Cardiff.

SIC CODE	DESCRIPTION	NO.
55.10	Hotels	
55.11	Hotels and motels, with restaurant (licensed)	42
55.12	Hotels and motels, with restaurant (unlicensed)	31
55.13	Hotels and motels without restaurant	0
55.20	Camping sites and other provision of short-stay accommodation	
55.21	Youth hostels and mountain refuges	8
55.22	Camping sites, including caravan sites	2
55.23	Other provision of lodgings not elsewhere classified	0
55.30	Restaurants	
55.31	Licensed restaurants	166
55.32	Unlicensed restaurants and cafes	64
55.33	Take-away food shops	206
55.34	Take-away food mobile stands	0
55.40	Bars	
55.41	Licensed clubs	23
55.42	Public houses and bars	140
55.43	Tenanted public houses and bars	0
55.44	Managed public houses and bars	0
55.50	Canteens and catering	
55.51	Canteens	0
55.52	Catering	19
	TOTAL	701

Source: Cardiff County Council

5.3   Quotas were set for size of employer (up to 10 employees / 11 -24 employees / 25 or more employees) and sub-sector (Hotels, restaurants, bars and canteens and catering), to maximise coverage across the sector. Results were weighted back to broadly match the profile of all hospitality businesses in Cardiff identified in the Annual Business Inquiry[13],

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[13] ONS.

Table 4 Catering Sector by Sub-Sector – Cardiff 2001

55.1 hotels & motels	6%
55.3 restaurants	47%
55.4 bars	37%
55.5 catering & canteens	11%
Total	100%

Source: Annual Business Inquiry 2001 / NOMIS. Note – Excludes youth hostels and camping sites.

5.4   In total, 102 interviews were held with employers representing a cross-section of catering and hospitality businesses across the Cardiff area. A low rate of refusals to be interviewed was achieved, with only 15 employers directly refusing to take part.

Table 5 Interview strike rate – employer survey

SIC	Category	Size	Interviews	Refusals
55.1	Hotels	1-10	4	1
55.1	Hotels	11-24	2	
55.1	Hotels	25+	2	
55.2	Camping sites	All	1	
55.3	Restaurants	1-10	30	10
55.3	Restaurants	11-24	16	
55.3	Restaurants	25+	13	3
55.4	Bars	1-10	17	
55.4	Bars	11-24	10	
55.4	Bars	25+	4	1
55.5	Canteens/Catering	1-10	2	
55.5	Canteens/Catering	25+	1	
	Total		102	15

Source: Beaufort Research. See Appendix 2 for technical summary

5.5   A questionnaire for the survey was developed in collaboration with the Project Steering Group (See Appendix 1). Interviews were piloted with a small number of employers to begin with, to check the flow of questioning.

5.6   Letters were sent out to all businesses on the Cardiff County Council database ahead of the survey taking place, to maximise co-operation from target businesses.

5.7   The survey's aims were to assess:

- The existing hospitality trade in Cardiff

- Current type and levels of staffing

- Gaps in current catering-related skills in the hospitality trade

- Recruitment difficulties faced by employers

- Current training provision

- Potential improvements in training provision to fill skills gaps

Setting the scene - Business type and ownership

5.8   Of the 102 businesses questioned the majority, 42% were restaurants, 26% were bars, 18% of respondents were in the canteen/catering business and 12% classified as hotels. This is broadly in line with the representation of businesses as identified in the Annual Business Inquiry14, although with a higher representation of catering companies and a lower proportion of restaurants.

**Figure 5 Description of business**
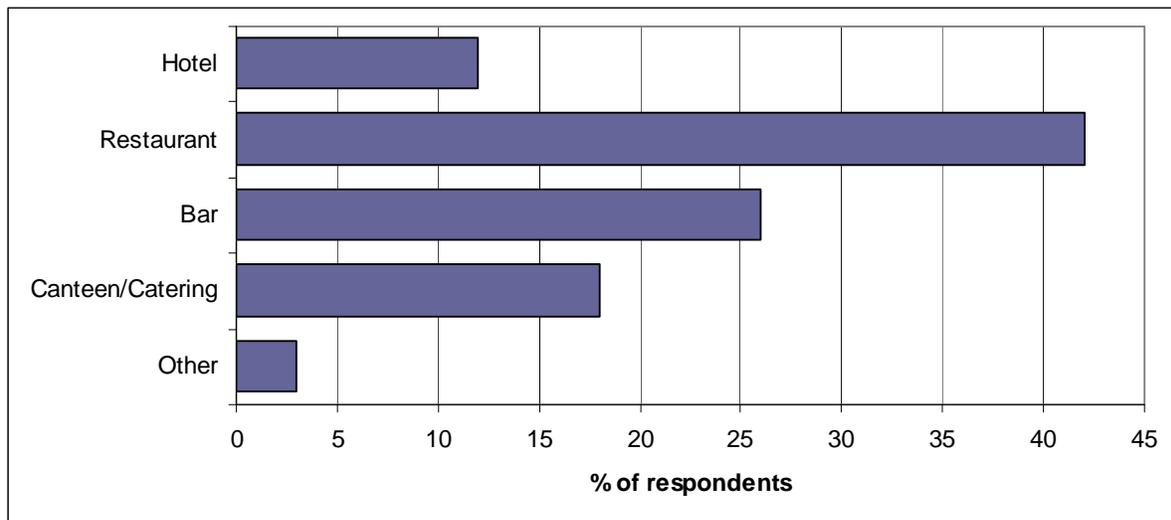
Source: Employer Survey Q1, base=102

5.9   There was a degree of polarisation in terms of business turnover amongst those interviewed. One quarter of respondents' businesses were turning over less than £100,000 and 15% had a turnover in excess of £500,000. There was, however, only a relatively small proportion of medium sized businesses.

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[14] National Statistics

Figure 6 What approximately is the current annual turnover of this business at this location?
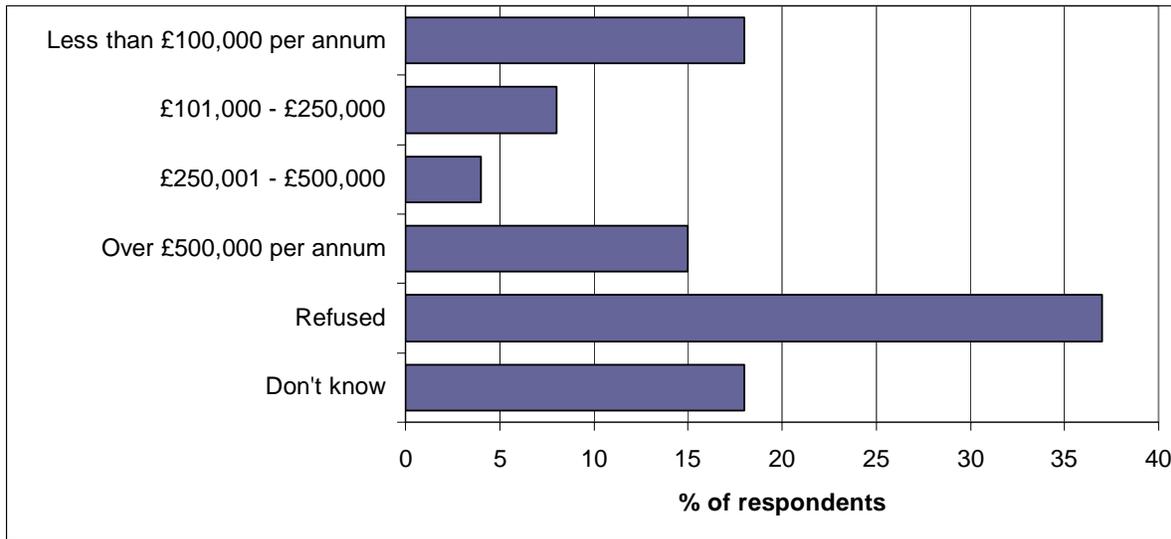
Source: Employer Survey Q31, base=102

5.10   Most of the hotel businesses were guest houses or offered bed and breakfast, although 26% described their business as a luxury hotel.

5.11   Of the Cardiff restaurant owners questioned the largest group described their business as popular dining, followed by those engaged in fast food or takeaway businesses. Approximately 15% were running restaurants they described as fine dining.

Figure 7 Description of restaurant
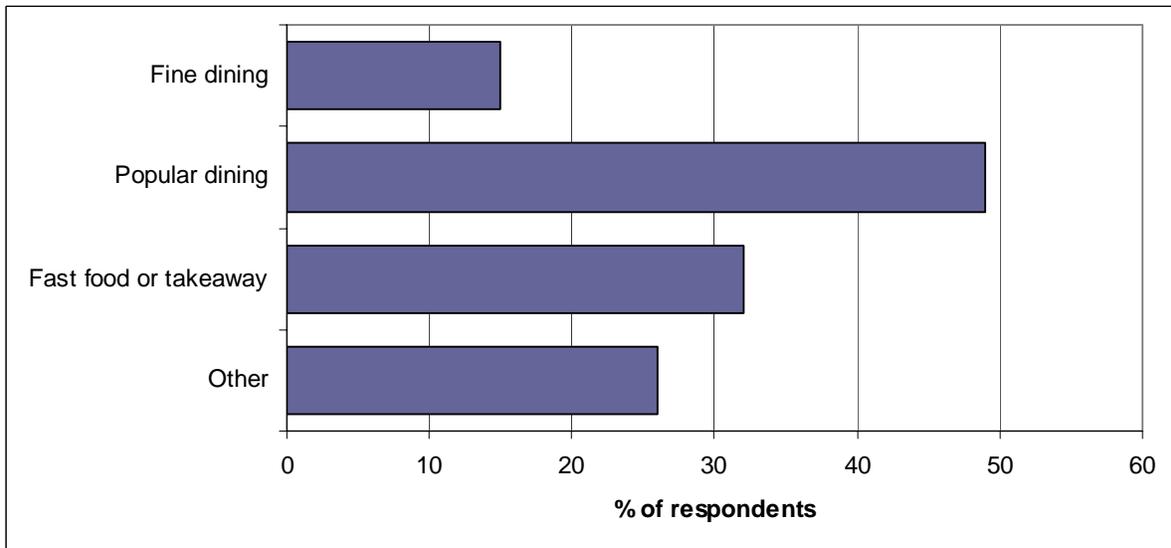
Source: Employer Survey Q3, base=45

5.12   The majority of restaurant businesses interviewed served European style food i.e. Welsh, British or French.

Figure 8 Type of food mainly served
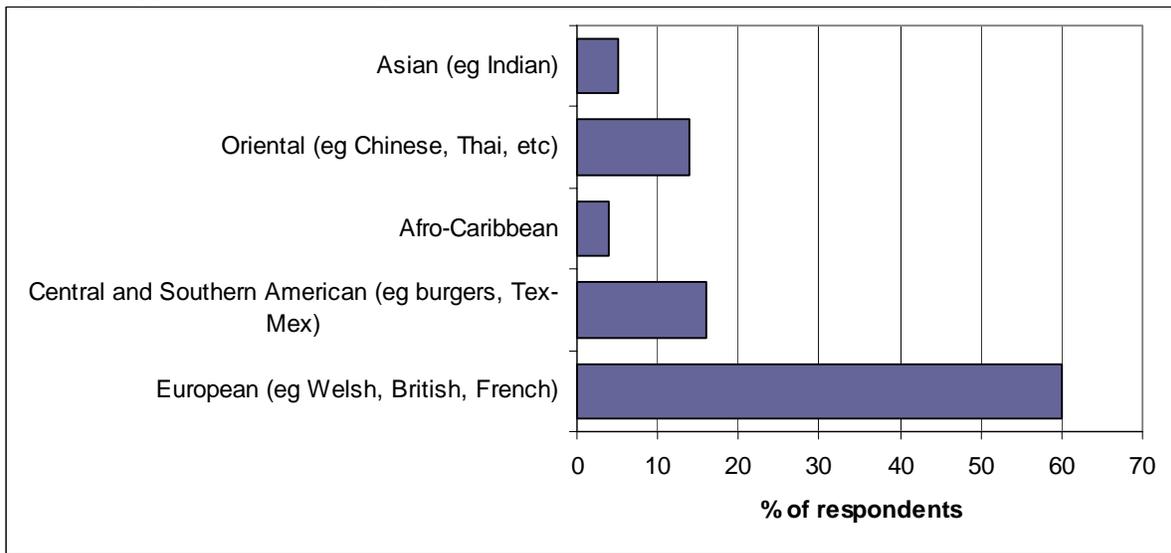
Source: Employer Survey Q4, base=45

5.13   The largest proportion of the pub businesses surveyed were managed houses, the rest
were split equally between tenanted and freehold properties.

Figure 9 Description of pub, bar or club
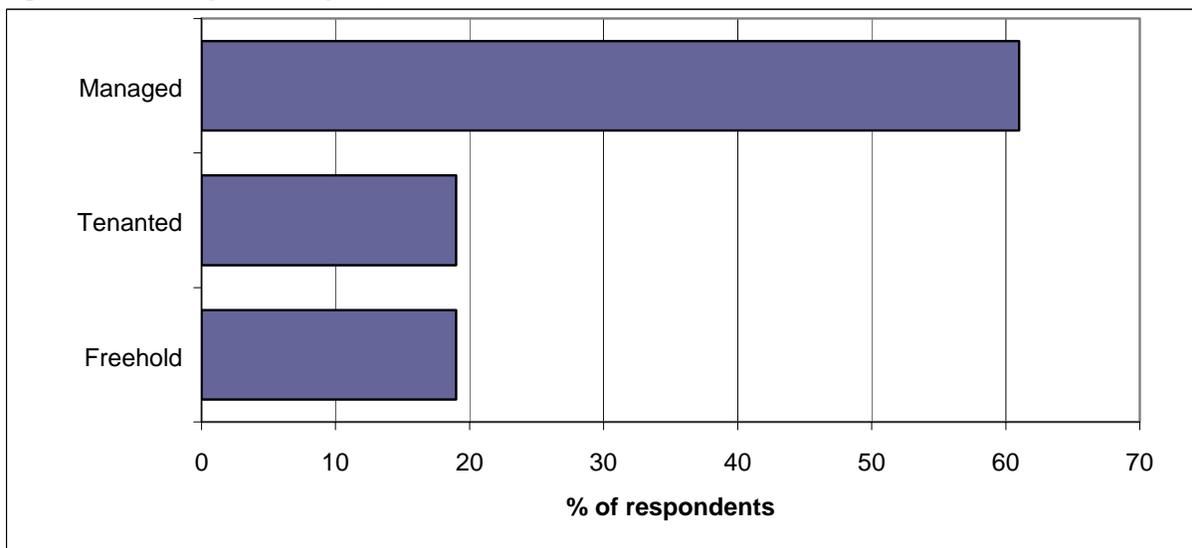
Source: Employer Survey Q5, base=29

Ownership

5.14   When questioned about the ownership of their business 42% of respondents said that
their business was owned by one person. Twenty eight percent classified themselves as a
private limited company and 19% were public limited companies.

Figure 10 Type of ownership
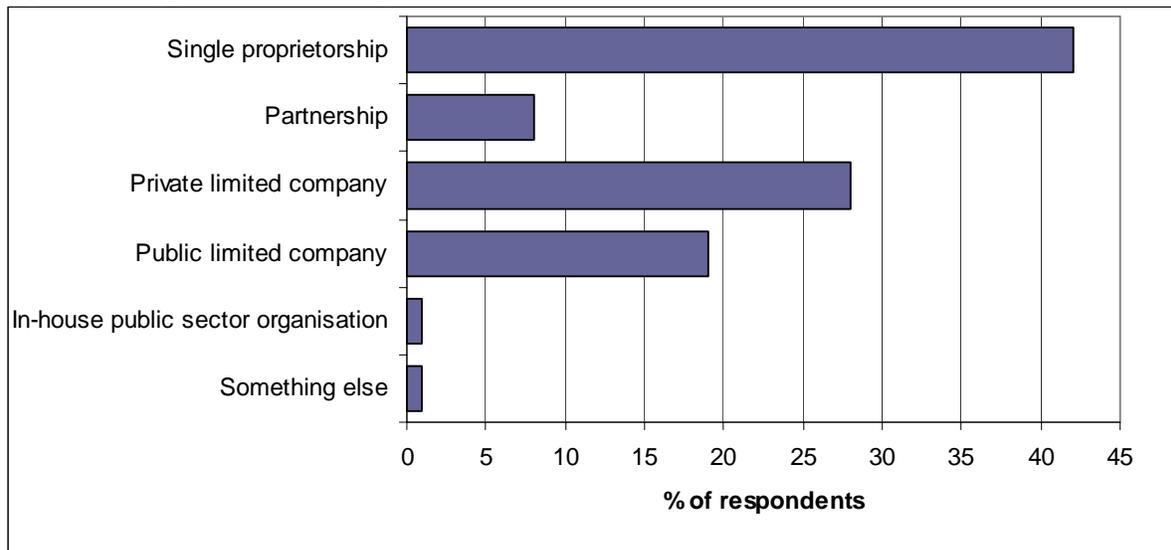
Source: Employer Survey Q7, base=102

5.15   Of the 102 businesses surveyed, 61% were classified as independent, 28% were part of a larger group and 12% part of a small chain.

Figure 11 Business type
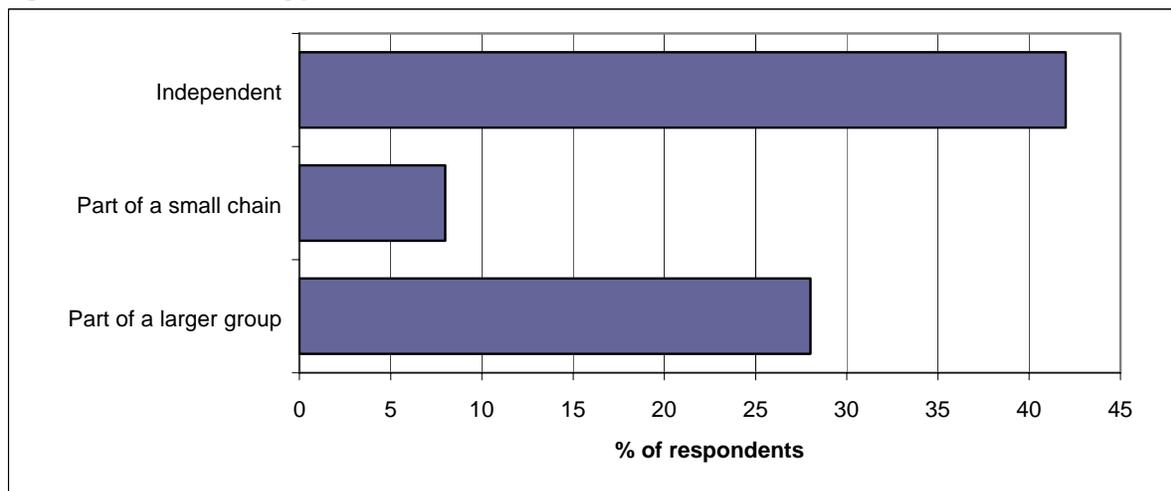
Source: Employer Survey Q8, base=102

Employment and recruitment

5.16   Decision-making with regard to recruitment and training of staff was largely carried out at a local level. Seventy-nine percent of respondents made decisions at their place of work rather than, for example at a head office. This figure was especially true of smaller companies employing less than 10, where 100% of decisions were made locally.

Figure 12 Where are major decisions taken regarding staff recruitment & training?
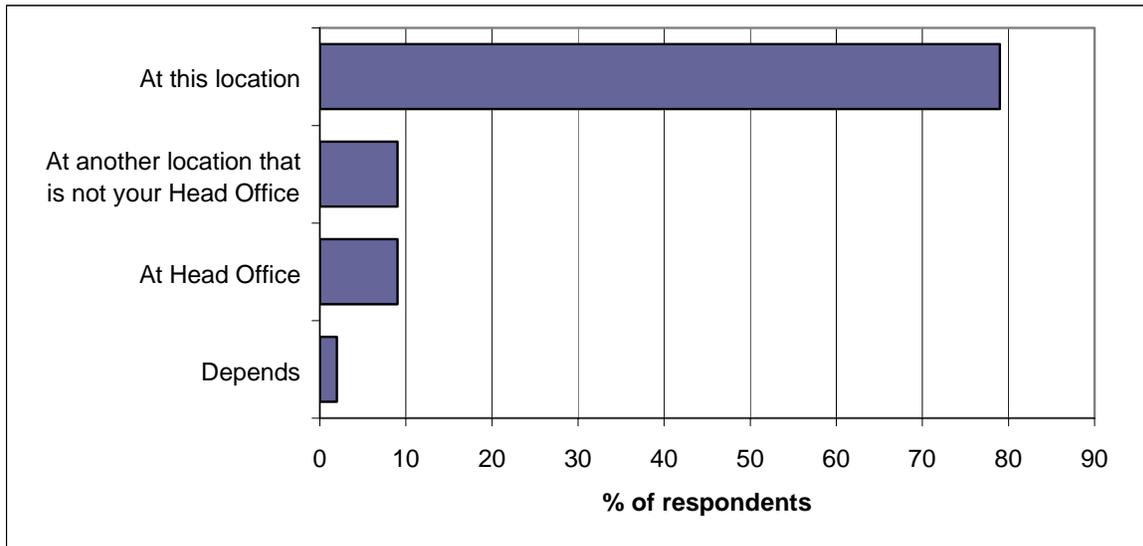
Source: Employer Survey Q9, base=48

5.17   Eighty percent of the catering organisations questioned employed between two and twenty staff, although the average number of staff employed overall was 17.

5.18   In terms of occupation, businesses were most likely to employ chefs and cooks (72% of respondents) and managers (65%).

Figure 13 Occupations staff are employed in
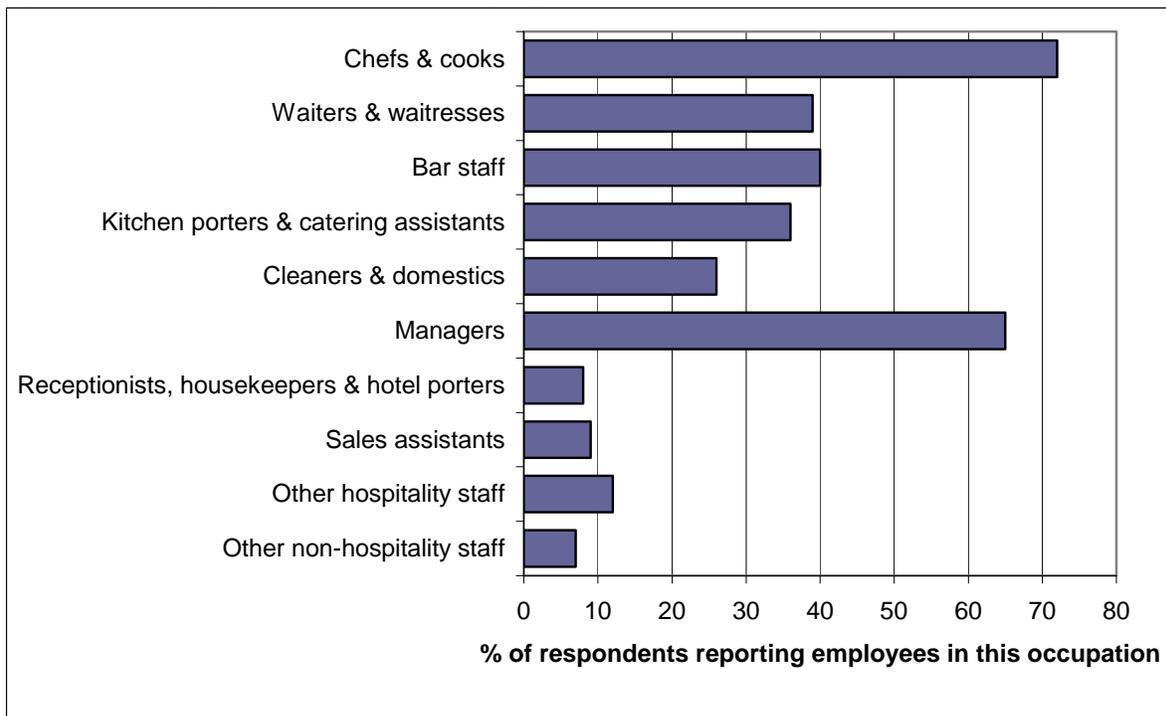
Source: Employer Survey Q10b, base=102

5.19   The data above is an indicator of occupations that are key to all businesses across the sector. However, the graph below shows the average number of people employed in individual occupations, by business. This provides a better indicator of the number and occupation profile of people working across the sector.

5.20   The data shows that an average business employs 10 bar staff, making them the most numerous occupation employed, followed by receptionists / housekeepers and waiters and waitresses.

5.21   As might be expected, managers formed the lowest proportion of the workforce in terms of numbers, despite having a presence in two-thirds of all businesses.

Figure 14 Average number of staff by occupation
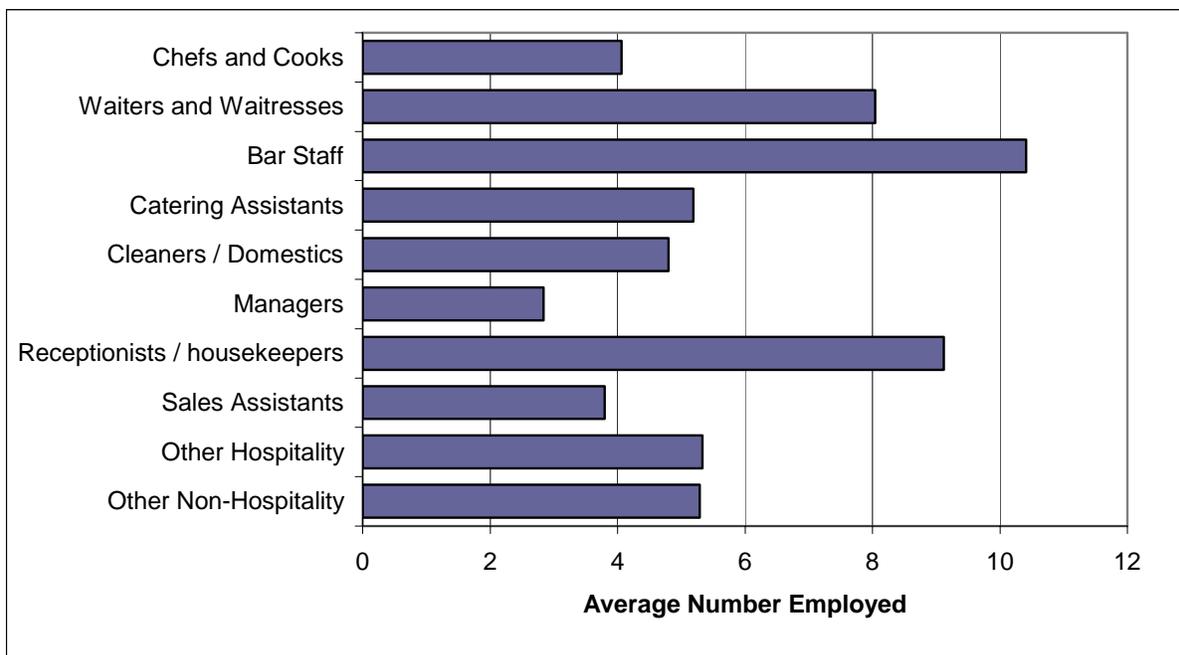
Source: Employer Survey Q10ba, base=75

5.22   Employers were asked about recruitment difficulties over the last year. Overall, 22% had experienced hard to fill vacancies, whilst almost three quarters of respondents said they had not experienced any difficulties in recruiting.

5.23   Larger organisations, restaurants and hotels were more likely than their smaller counterparts or pub businesses to have experienced some difficulty in recruiting.

Figure 15 Have you experienced difficulties in recruiting new staff in the last year
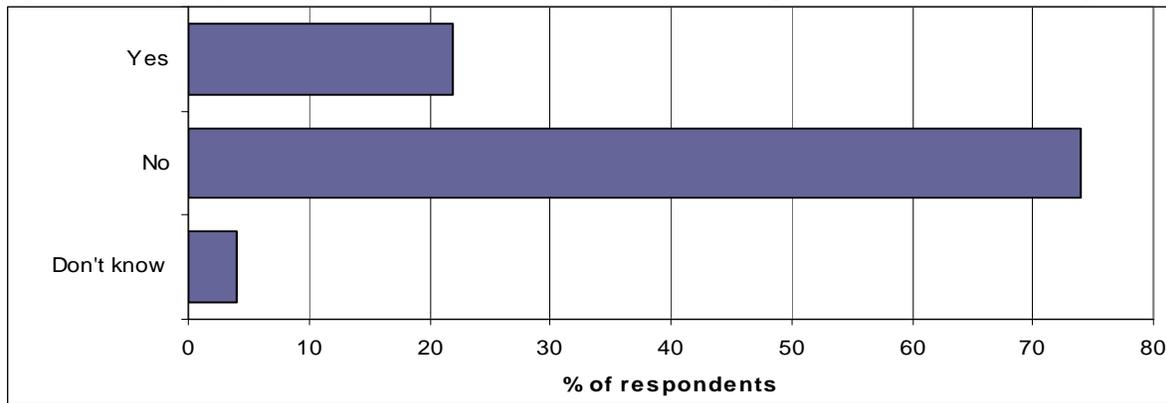
Source: Employer Survey Q15, base=102

5.24 Of the organisations that had experienced difficulties in recruiting staff, chefs were the most common occupation affected, and more than three quarters of employers affected had difficulties recruiting core catering staff - i.e. chefs, waiters and waitresses and kitchen porters and catering assistants.

Figure 16 In which occupations have you experienced difficulties?
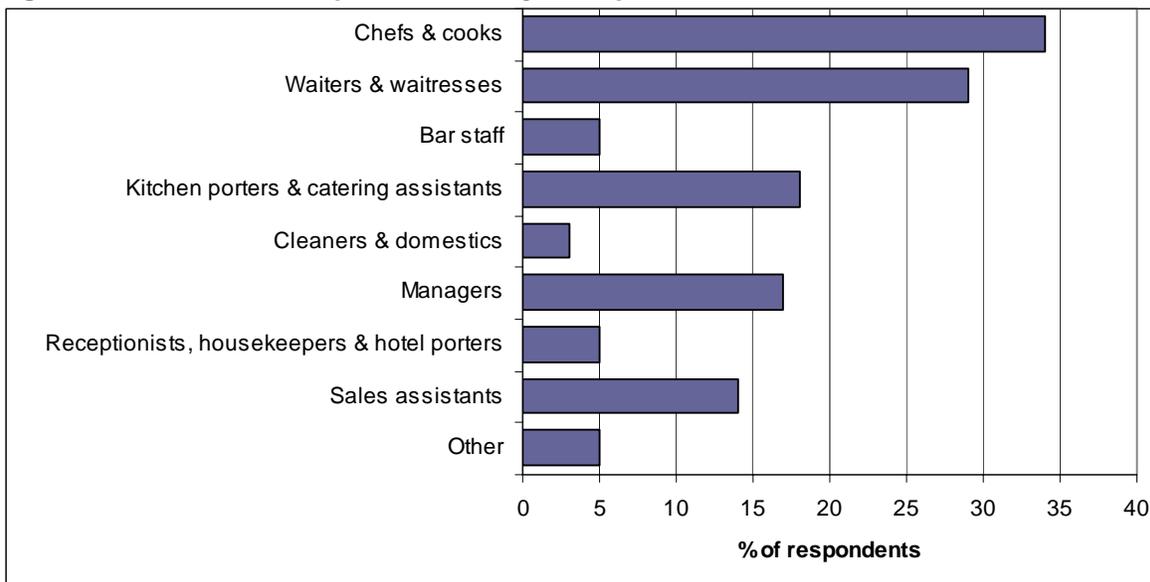
Source: Employer Survey Q16, base=23

5.25 The main perceived reasons for hard to fill vacancies were:

- A lack of applicants with the required personal and social qualities

- A lack of applicants with the required skills

- A lack of applicants with required work experience.

5.26   Of those who identified a lack of skills or personal and social qualities in applicants, the most common skills lacking were customer care, communication skills and food preparation and cooking.

Figure 17 What particular skills or experience did applicants for this vacancy/these vacancies lack?
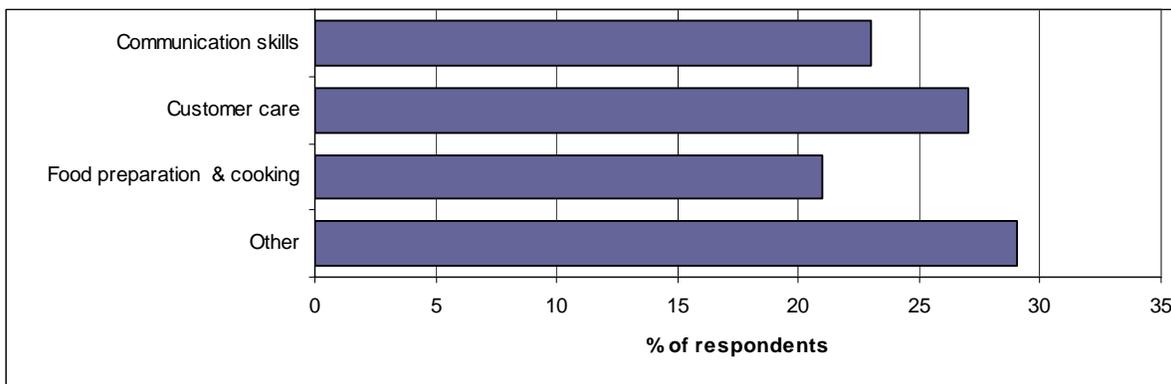
Source: Employer Survey Q18c, base=13

5.27   A small proportion said that applicants lacked the required qualifications. When this group was asked further, they identified NVQ in food preparation and cooking as the qualification lacking.

5.28   Approximately three-quarters of the vacancies that had proved hard to fill were full-time positions.

Figure 18 Were the hard to fill vacancies mainly part-time or full-time?
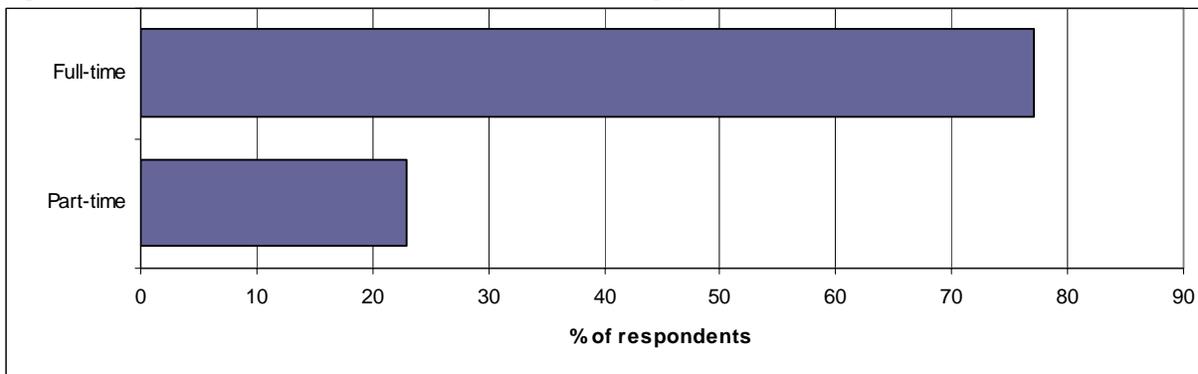
Source: Employer Survey Q19, base=23

Skills and training issues

5.29   Employers were asked whether they felt that there was a gap between the skills of their current staff and those that the organisation needed to meet its business requirements. Of the 102 respondents, a large majority (88%) felt that their current staff had adequate skills and only 12% felt that there was a skills gap in their current work force.

Figure 19 Is there a gap between the skills of current employees and those organisation need to meet its requirements
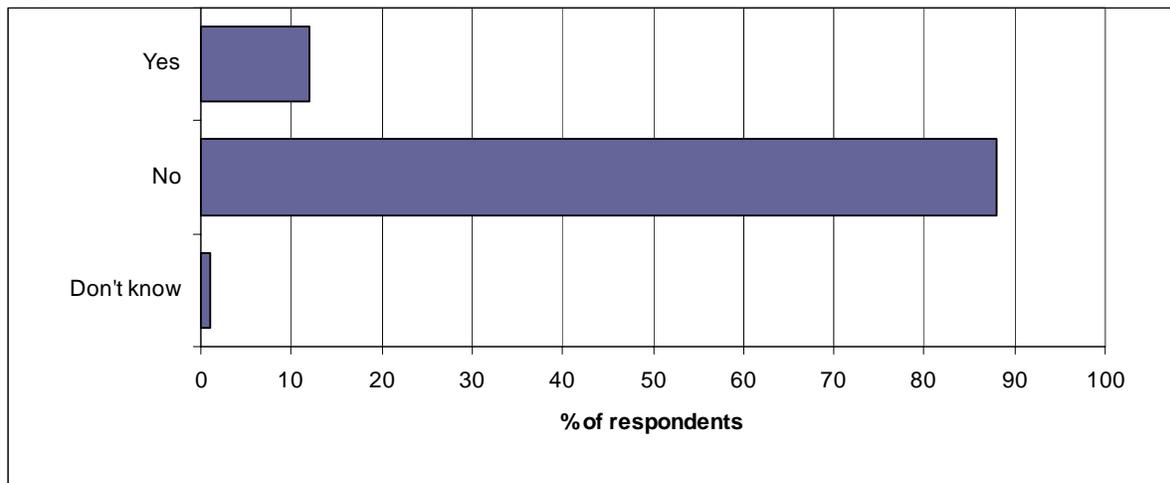
Source: Employer Survey Q11, base=102

5.30   Of those who reported a skills shortage, by far the majority perceived it to be in the members of staff employed as chefs and cooks. Further research showed that the areas most lacking in skills were food hygiene, food preparation and cooking. Other skills mentioned included kitchen management, customer care and developing staff.

5.31   Where there was a skill gap indicated by an organisation, customer service levels were affected and there was an increase in costs especially in the investment of training.

Figure 20 What effect, if any, has the lack of skills had on your business?
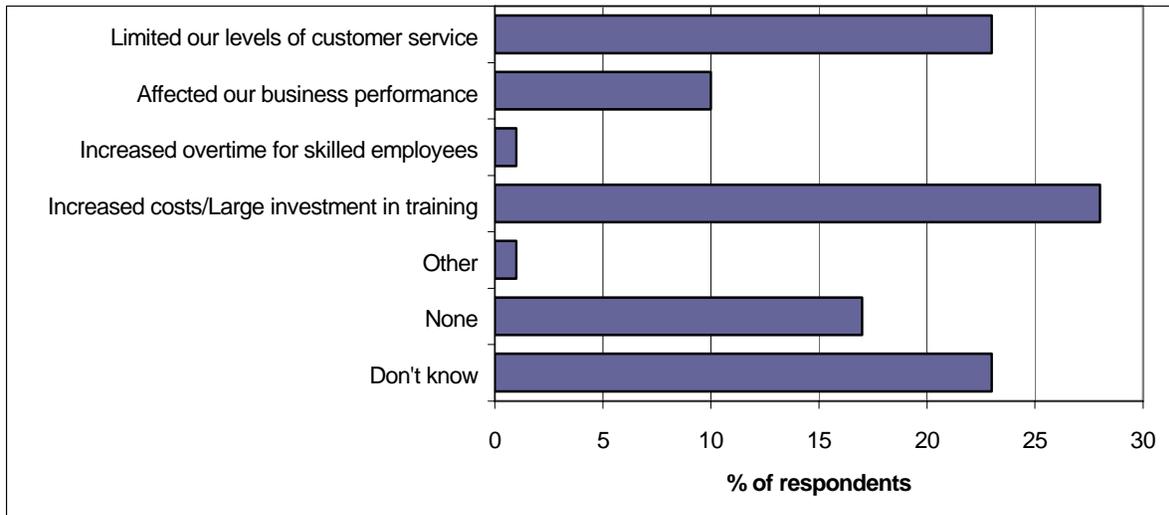
Source: Employer Survey Q14, base=16

5.32   Forty-six percent of those questioned had funded or arranged training for all of their staff in the last year. Larger businesses were slightly more likely to have trained all of their staff.

Figure 21 approximate proportions of employees involved in training and development activities last year
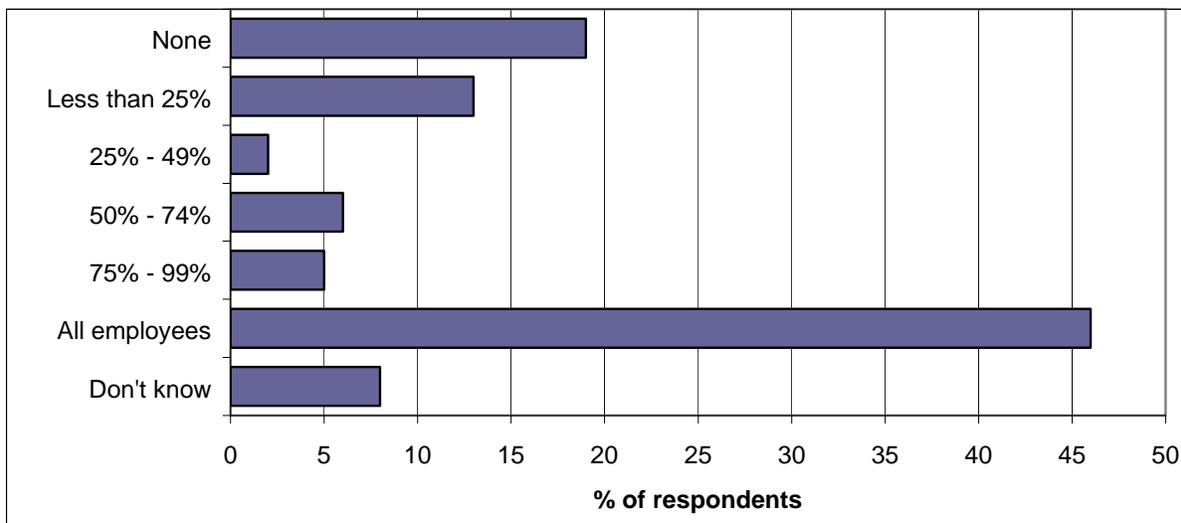
Source: Employer Survey Q20, base=102

5.33   However, nineteen percent of businesses had arranged no training at all for their staff and one-third overall had trained less than 25% of their employees during the previous twelve months.

5.34   Fifty six percent of employers who trained their staff provided on-the-job training, whilst 17% provided off-the-job training. Twenty-seven percent of employers arranged both types.

Figure 22 Type of training undertaken by employees over the past year
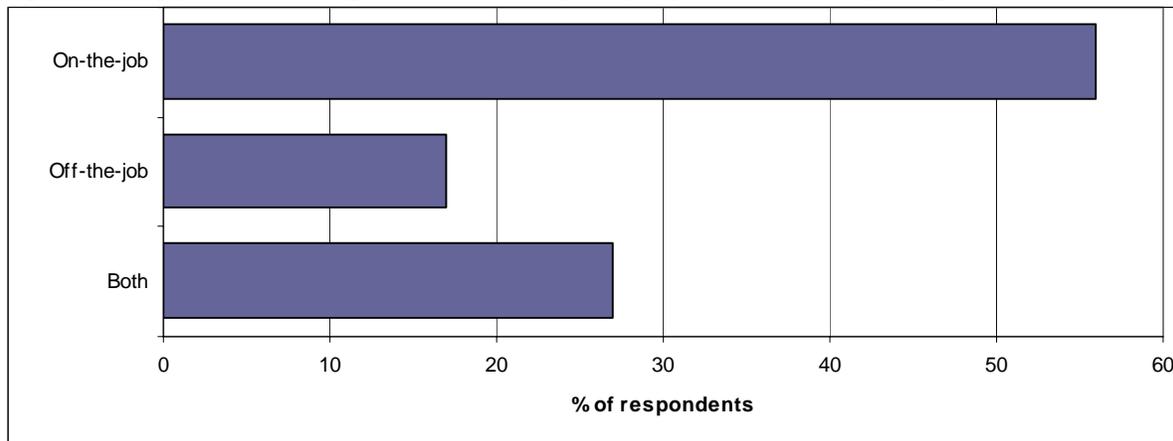
Source: Employer Survey Q21, base=78

5.35   Almost three-quarters of on-the-job training was run by a member of staff and only 14% used an external training provider.

Figure 23 On the job training was mostly run by
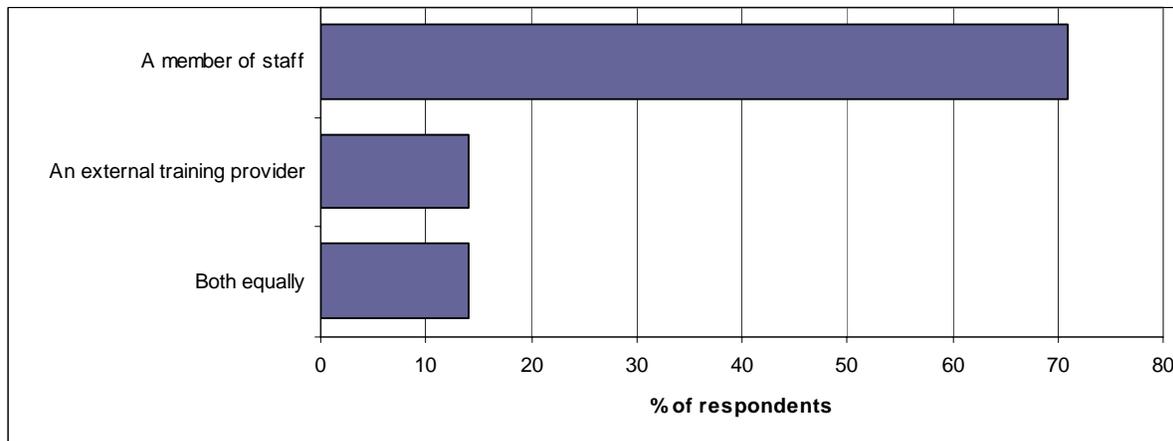
Source: Employer Survey Q22, base=69

5.36   Of the companies using off-the-job training, 60% had used an external trainer, i.e. a college or private training provider.

Figure 24 Off the job was training mostly run by
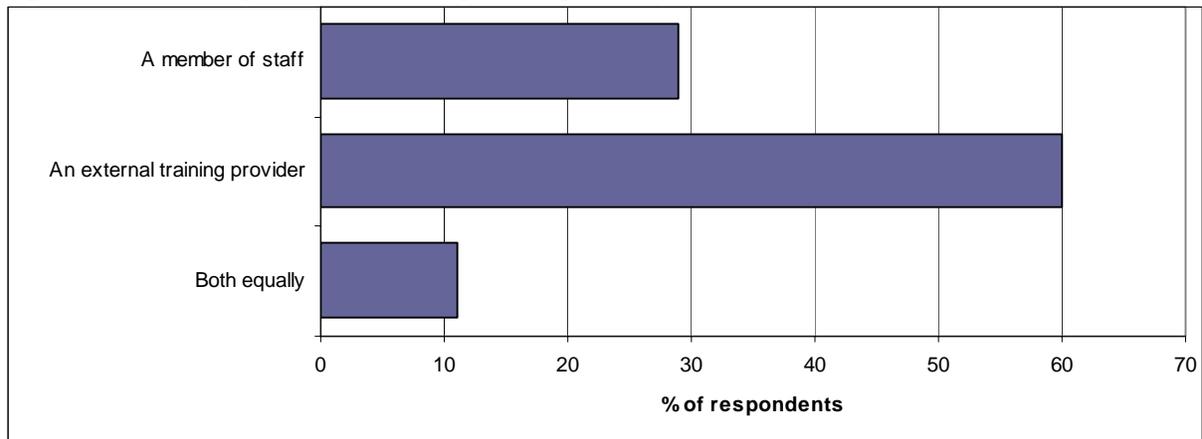
Source: Employer Survey Q23, base=9

- Of those using off-the–job training, almost two-thirds used a locally-based provider, although 30% were travelling further afield The proportion of employers using less locally-based training providers was higher amongst the hotel sector and amongst larger employers, although caution has to be exercised here due to small sample numbers. However, the proportion might reflect centralised purchasing of training by hotel chains, leading to training providers being brought in from elsewhere.

Figure 25 Is/are the training provider/s you usually use based locally or further afield?
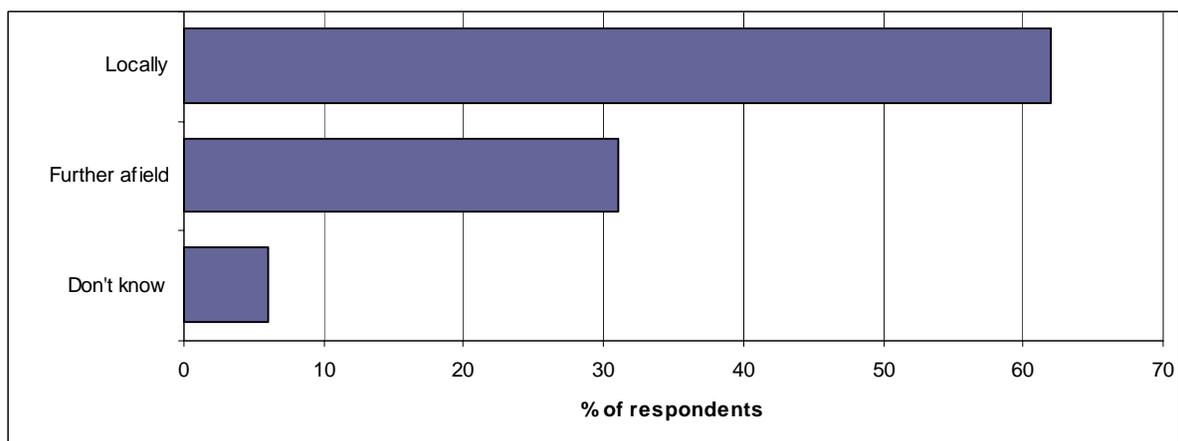
Source: Employer Survey Q24, base=23

Learning delivery

5.37   Short courses were the most popular with employers – 54% of all those interviewed had used them during the previous 12 months. Thirty six percent of respondents had used mentoring for staff training and 16% had used part-time courses.

Figure 26 Which of the following types of courses has your company used in the last 12 months or so?
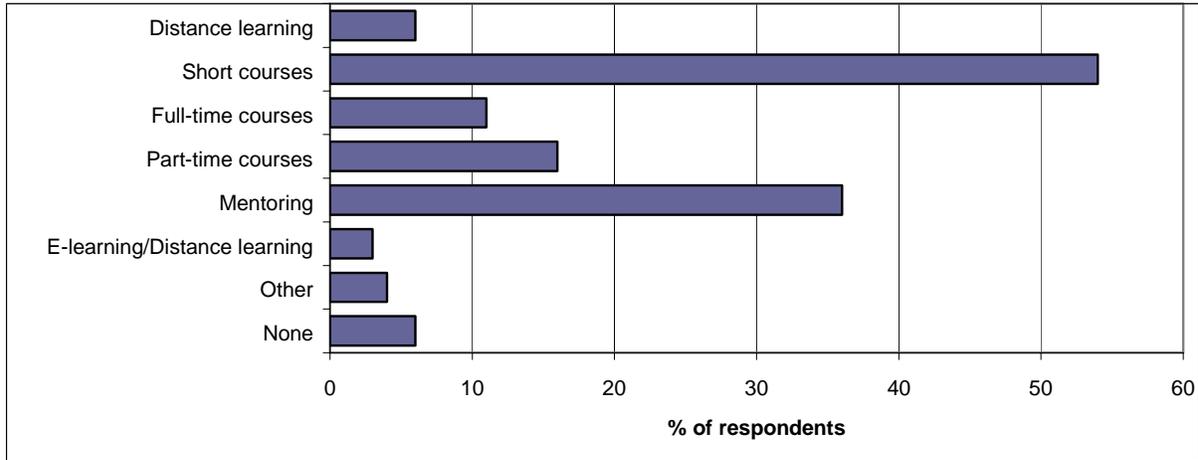
Source: Employer Survey Q25, base=78

5.38   Training provided by employers had covered a broad spectrum of skill areas ranging from management training, through to health and safety, food hygiene and communication skills.

Figure 27 In which of the following skills areas have your employees undertaken training over the past year?
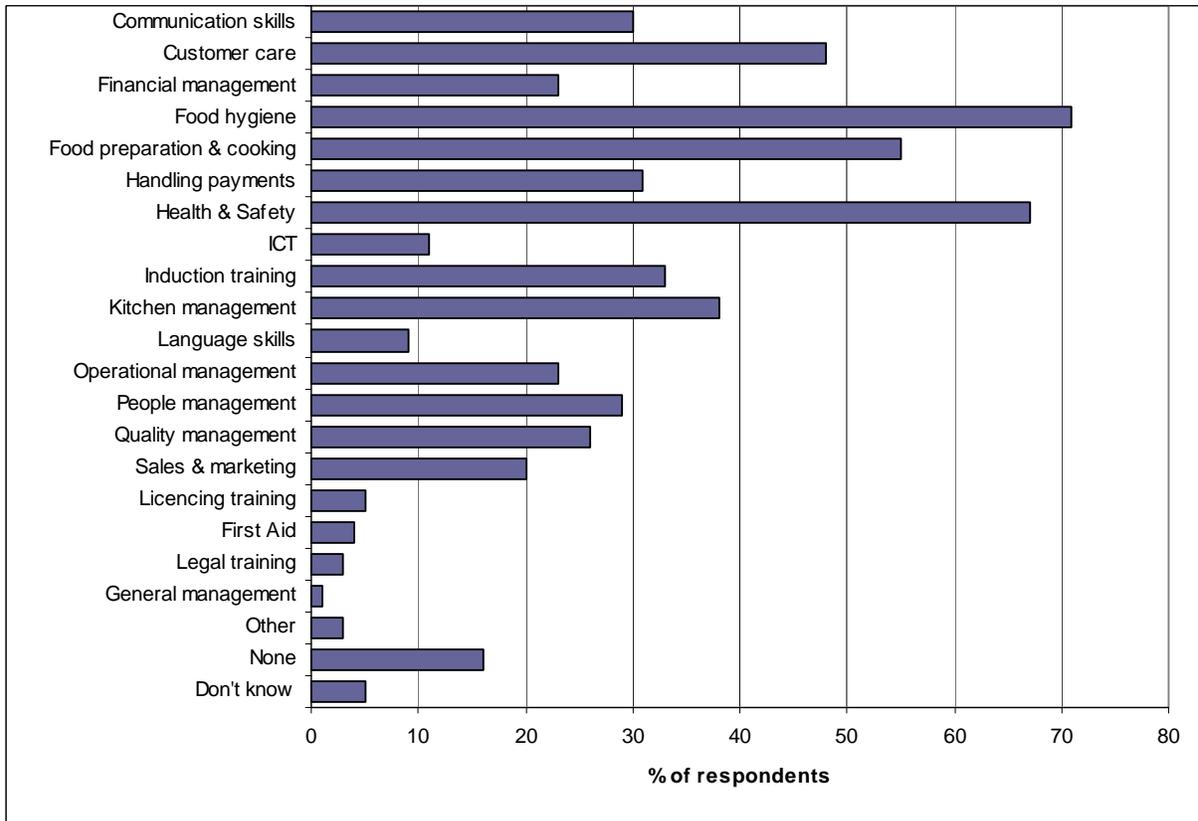
Source: Employer Survey Q26, base=102

5.39   The most popular areas were unsurprisingly food hygiene and health and safety (delivered by 71% and 67% of businesses respectively), where there is a quasi-legal requirement for employers to train staff. Other key areas of learning included food preparation and cooking (55%), customer care (48%) and kitchen management (38%).

5.40   Generally, the spread of learning accessed illustrates the breadth of need in the sector and perhaps especially in terms of different areas of management (kitchen, people, quality, operational etc).

Barriers to learning

5.41   Employers were asked whether there were any barriers to them training their staff. Thirty percent felt that either the cost of training or the difficulties of allowing staff time off to learn created a barrier. However, 53% of respondents stated that either their current training was adequate or that training was not needed.

Figure 28 Factors which limit/present a barrier to training
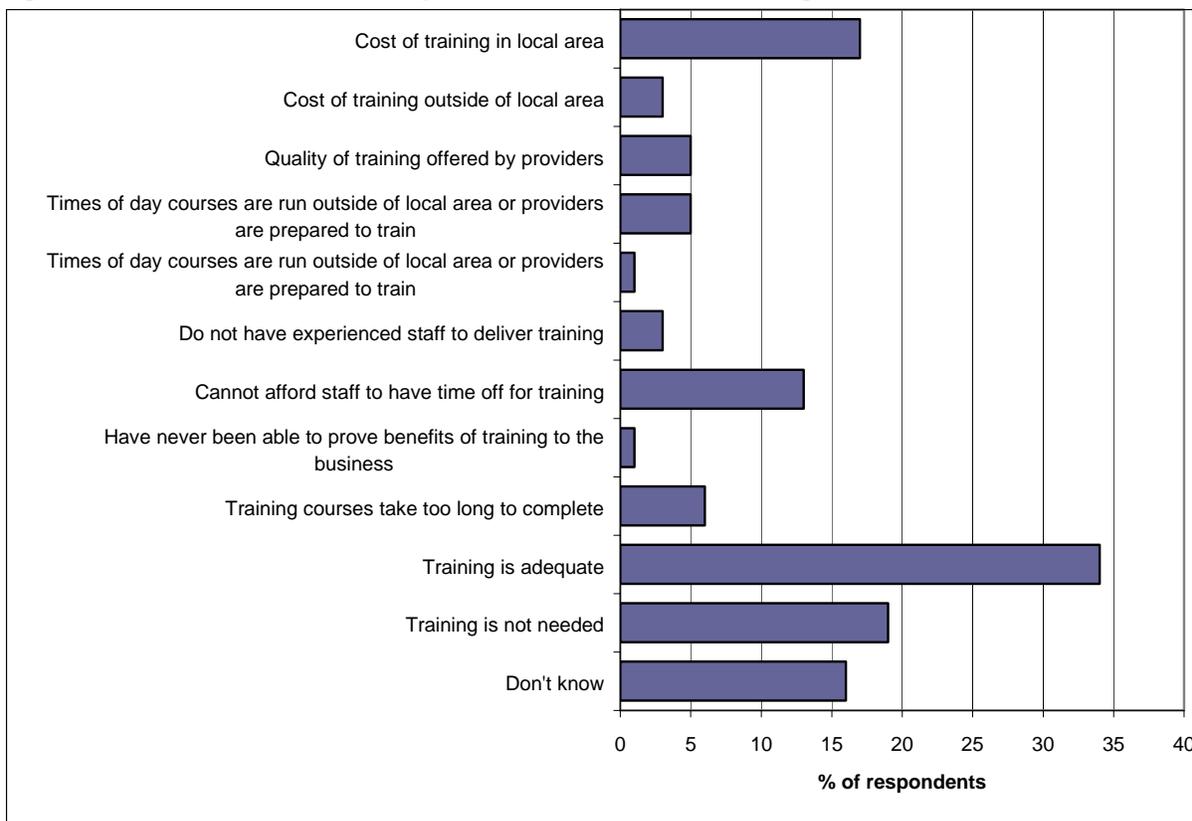
Source: Employer Survey Q27, base=102

Improvements in delivery

5.42   In response to the question of what improvements employers would like to see in the training available to them, 13% of respondents said they would like to see more training

available in the work place and 12% said that the training should be provided free of charge. However, 43% felt that existing training was adequate and that no improvements were needed.

Figure 29 What kind of improvements would you like to see in the training available?
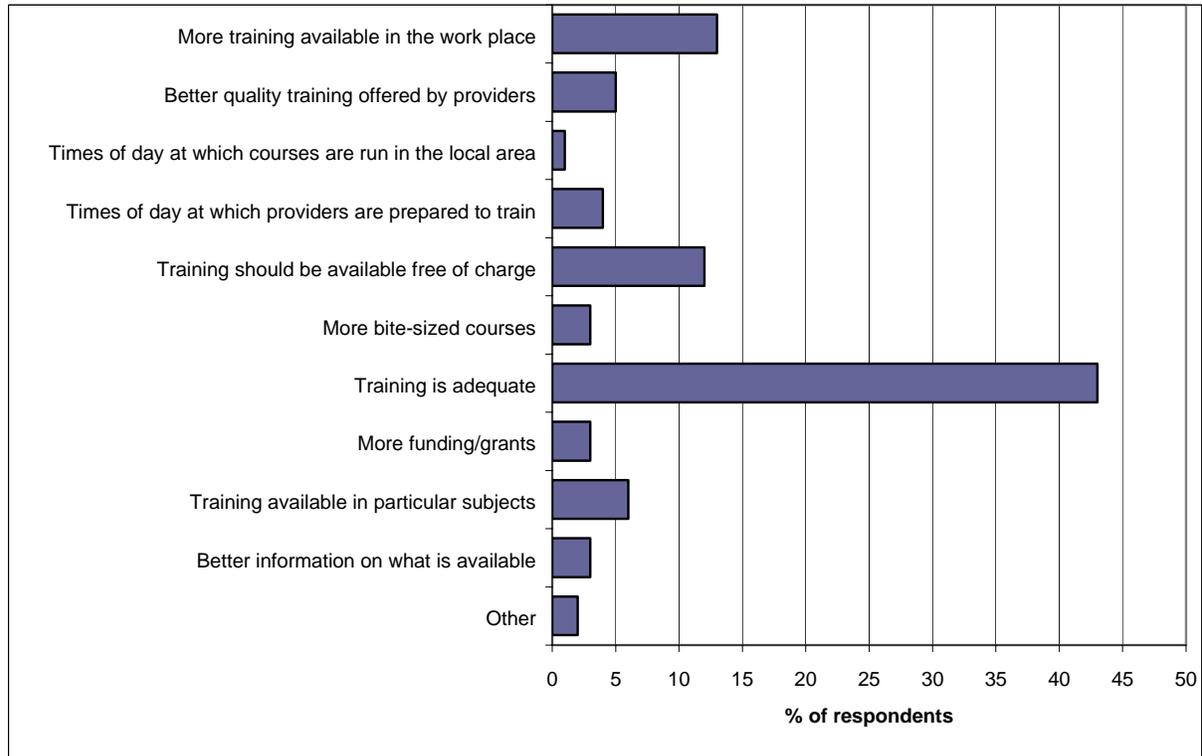
Source: Employer Survey Q28, base=102

Attitudes to Learning and Recruitment

5.43   Interviewees were asked to comment on a series of statements relating to learning and recruitment – to test perceptions of qualifications, learning delivery and the quality of potential recruits.

   Attitudes to NVQs

5.44   Half of the respondents agreed that NVQs fit well with their training needs. Those running pubs and bars were more likely than average to agree strongly with this idea. Smaller businesses were less likely than average to agree.

5.45   A significant proportion, 19%, did not know whether NVQs were suitable for their training needs.

Figure 30 NVQs fit well with our training needs
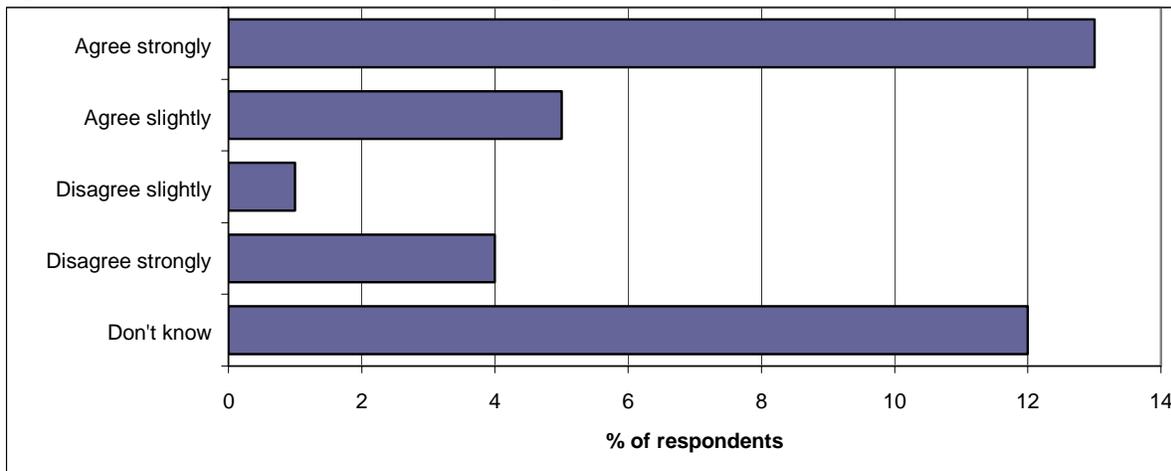
Source: Employer Survey Q29a, base=102

School / college leavers are usually not work ready

5.46   Overall, college leavers are perceived to be significantly more work ready than their school leaving counterparts. A balance of +15% of employers agreed with the statement that school leavers are not usually work ready, whilst a balance of −19% of employers disagreed with the statement in relation to college leavers and 34% of them disagreed strongly.

Figure 31 School / college leavers are usually not work ready
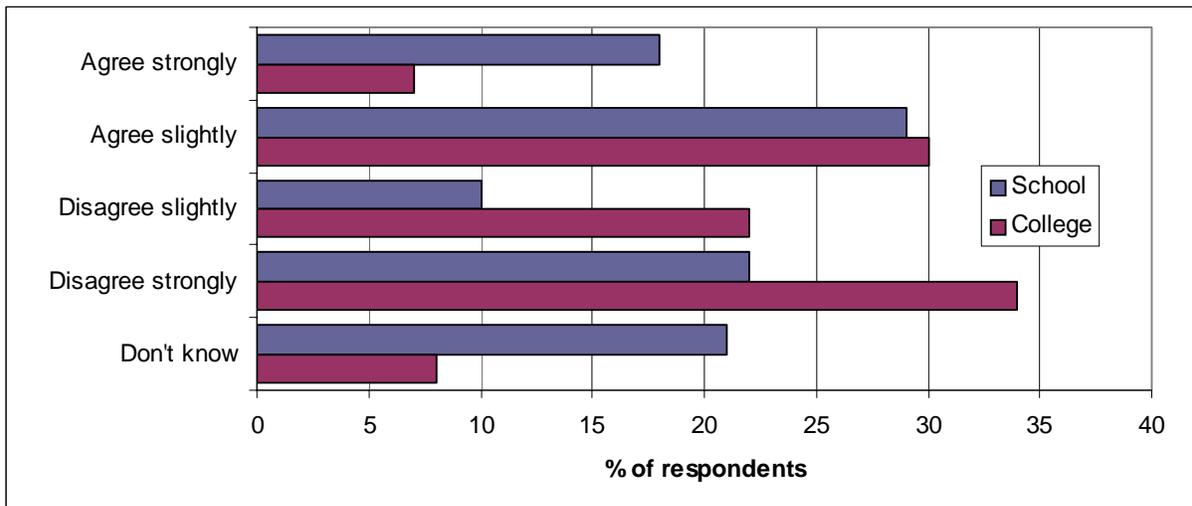
Source: Employer Survey Q29b, base=102

Location of / rationale for training

5.47   Sixty percent of respondents agreed strongly that they prefer their staff training to be carried out on the job. This figure is true irrespective of the size of company.

Figure 32 I prefer training to be carried out on the job
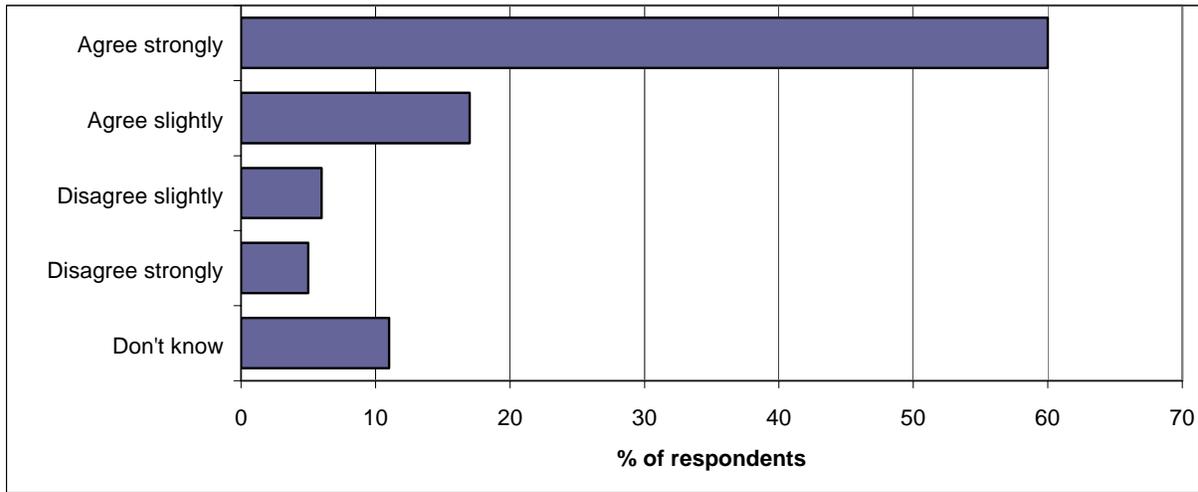
Source: Employer Survey Q29d, base=102

5.48   Fifty eight percent of respondents agree that legislation is the deciding factor in driving most of their training. Interviewees in pub and bar businesses were more likely than average to adopt this perspective, implying that the hotel and restaurant market represents the more proactive market for non-compulsory training.

Figure 33 Legislation drives most of our training
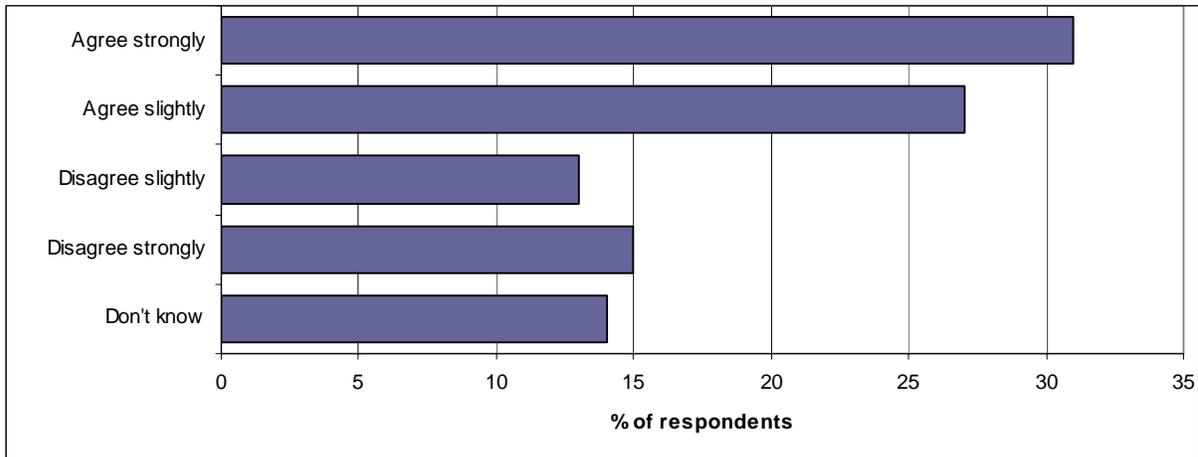
Source: Employer Survey Q29e, base=102

Work experience

5.49   Opinion in relation to work experience was split, but with a slight balance (-4%) of employers disagreeing with the idea that it is difficult to organise work experience in the catering business.

5.50   Restaurateurs were slightly less likely than average to take this view, but there was no distinction between small and larger organisations.

Figure 34 It is difficult to organise work experience within our business?
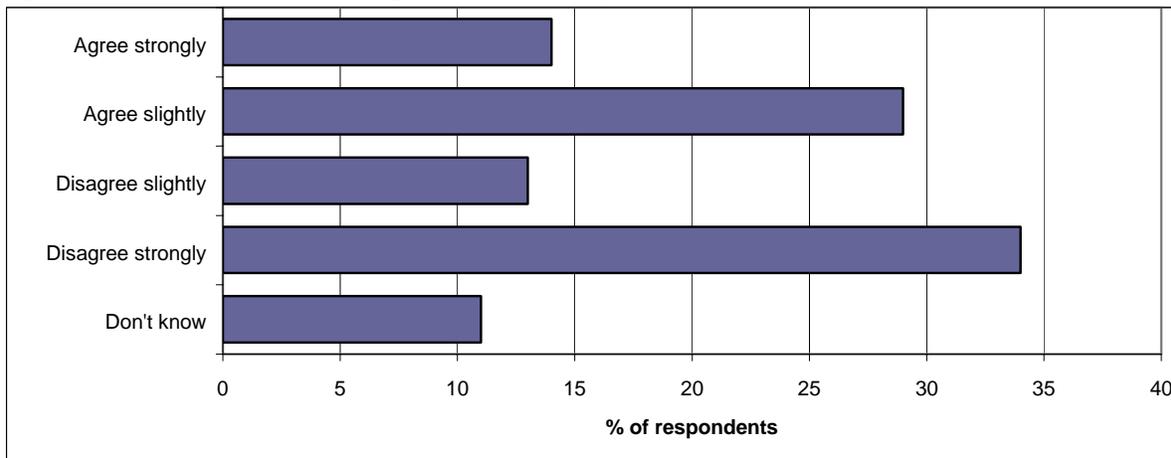
Source: Employer Survey Q29f, base=102

Sharing training

5.51   Sixty percent of respondents liked the idea of businesses getting together to share training. Those engaged in the pub and restaurant sectors were more likely to favour the idea than hoteliers were.

Figure 35 Businesses should get together more to share training
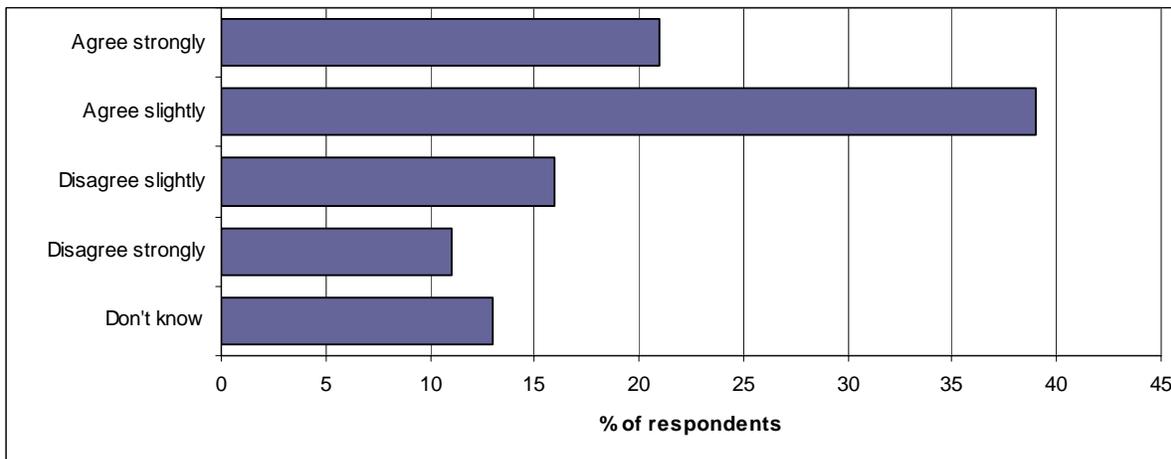
Source: Employer Survey Q29g, base=102

Business optimism

5.52   Seventy six percent of respondents predicted that the hospitality market would grow in the next 12 months. Of these, 33% felt the predicted growth would be rapid.

5.53   Sixteen percent of respondents felt that there would be no change in the hospitality market and only 6% expected any decline. Those in the hotel sector were particularly optimistic, with all those interviewed expecting growth.

Figure 36 Over the next 12 months, would you say that the market for hospitality in Cardiff is likely to.
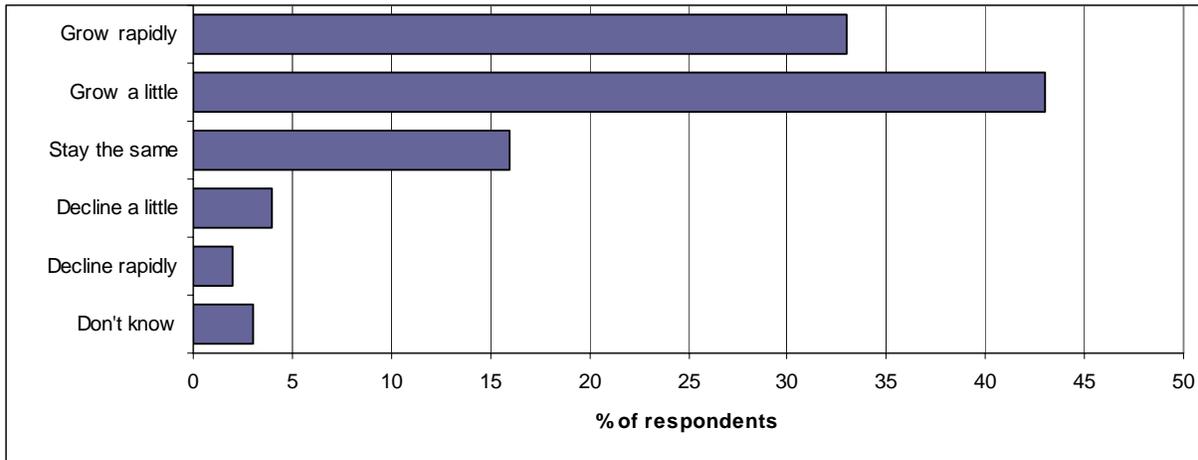
Source: Employer Survey Q30, base=102

6   Benchmarking with Other Regions

Belfast - Tourism Training Trust (www.tttni.com**)**

6.1   The Tourism Training Trust is an Independent body sponsored by the Department for Education and Learning. It has very close links with the Northern Ireland Tourist Board. It is core funded for delivering a co-ordinated strategy for Tourism for Northern Ireland.

6.2   Gaps in training resource are identified and the organisation develops new innovative approaches, for example a new Chef Development Programme which is currently being piloted. It manages the contract for Welcome Host and the new Welcome to Excellence programme. It sub contracts all provision and signposts learners to these providers.

6.3   Main providers are Colleges but employers request more Work Based Learning and this is being developed further.

6.4   Hospitality and catering has the same difficulties in Northern Ireland as elsewhere in the UK and TT Trust is endeavouring to promote itself as a one-stop shop for support to the industry, but integrating support with Invest Northern Ireland, a body similar to Business Links/Business Eye.

6.5   As in Wales, there are a plethora of bodies in Northern Ireland involved in Tourism. However, TTT's role is now felt to be understood by the key players, including the Careers advice and guidance agencies, providers and the other public sector bodies.

Dublin - Failte Ireland

6.6   Failte Ireland has emerged from the merger of Board Failte (Tourist Board) and CERT (Training Body for Tourism). It enjoys significant ongoing investment from the Irish Government (approx €20-30M). All skills issues relating to hospitality and catering are referred/managed by the organisation.

6.7   The body does deliver some training directly (particularly aimed at Business) but the majority of training is Public Sector and delivered through 11 Institutes of Technology. All training for individuals is free and there are no eligibility criteria other than those claiming benefit who cannot opt for a full time course.

6.8   Non-nationals are supported in learning under the initiative. A number of Return to Work programmes are run directly by Failte, aimed at women returners, carers and other disadvantaged groups. These tend to be 10-week programmes.

6.9   The Board is made up of employers and stakeholders and employers have a major say in the development of new programmes. Regular research is conducted and consultants regularly review the relevance of courses in relation to employer need and economic circumstances.

6.10   A decline in the number of potential recruits has occurred, partially due to demographics and the greater options available to young people. A number of years ago there were eight students applying per place, compared to one and a half per available place now.

6.11   There is a real emphasis on marketing and promotion of the industry and opportunities within it. Failte Ireland is responsible for a comprehensive series of roadshows, advertising programmes, open days, demonstrations, use of mentors, chef demonstrations and talks from industry personnel. These are organised in cooperation with schools, colleges, town centres and other venues designed to attract more people into the sector. Work experience plays a key role, organised by Failte and quality assured by them. Employers have to meet particular criteria and are approved against the code of standards.

Case Study 6 – Failte (Ireland) Employee Qualification Scheme

With this scheme, training takes place in the workplace as part of the daily routine. At no stage do workers need time off to complete the course. Employees can train at their own pace (minimum training period is 16 weeks).

Training and certification is currently offered at skills level in:

- Cookery
- Restaurant
- Bar
- Accommodation

This apprenticeship approach allows employees trained in the workplace to achieve a nationally recognised qualification. It is open to employees and casual workers without educational qualifications and the flexibility of this programme means it is aimed at all sectors and sizes of businesses.

Fáilte Ireland approves employers as having the necessary resources, including a qualified on-site trainer, to support the training. Businesses receive a grant of up to £200 for each employee successfully completing the programme (maximum of five per year) and workers are rewarded with £100 on completion of training.

Glasgow - Tourism People Scotland

6.12   Tourism Training Scotland became Tourism People Scotland (TPS) recently to reflect the emphasis on people development and to move away from the term training. The organisation was formalised in 2000 following a voluntary partnership developed from industry representatives, Scottish Enterprise, Visit Scotland - the Tourist Board and a host of other organisations such as Springboard, Chamber of Commerce and the Federation of Small Businesses.

6.13   With the development of Sector Skills Councils (SSCs), Tourism People Scotland will be dissolved but as the organisation is already doing the work of the SSC, the decision has been made to retain the name. (The English name for the SSC is People First, Scotland's SSC will be known as Tourism People as there is already recognition for it.)

6.14   A key success factor has been the fact that TPS is Industry led. The new board of the SSC will be purely private sector but there is a new 'enablers group' made up of members of the Board of Tourism People Scotland (the public sector influencers) to act as a support mechanism.

6.15   The Scottish Tourism Forum is a forum of employers, which has engaged in high level ambassadorial training and mentoring. (More senior level employees than, for example, Springboard utilises.) The rationale for this is that companies are more likely to listen to other private sector colleagues than public sector representatives. However, this forum faces an uncertain future due to the emergence of the SSC.

6.16   A comprehensive mapping and audit exercise was conducted regarding current catering learning provision in Scotland. It included Colleges, Area Tourist Boards, Scottish Enterprise Agency/Highlands and Islands funded Enterprise Agencies and Private Training providers.

6.17   The audit concluded that Scotland did not have a learning supplier problem and that there was adequate cover for both off-site and on-the-job training for young people and adults, although many employers saw colleges as too remote and inflexible.

6.18   TPS influenced questions in the Future Skills Scotland survey to identify specific issues. The answers were concluded to lie in increasing demand for learning and changing attitudes of both employers and individuals.

6.19   TPS has developed **'**Pride And Passion' - a comprehensive programme of mentoring, ambassadorial and buddying work for the industry, with a move away from traditional training. All the main partners have signed up to the initiative, including Springboard - which has a significant role to play in working with schools and teachers, delivering curriculum development for example.

6.20   The funding for TPS has come from the Scottish Executive, through Scottish Enterprise/Highlands and Islands Enterprise. The core funders of college provision are the FE and HE Funding bodies but there is significant linkage with Scottish Enterprise who fund vocational qualifications and work based training.

6.21   There is a move for all skills development for Tourism to be managed by Visit Scotland, the Tourist Board, as they deliver approximately 10,000 visits to SMEs per year. A current restructuring of Area Tourist Boards signifies a change in this direction.

6.22   Work is underway in Scotland (as in Wales and England) to move towards the Centres of Vocational Excellence model for colleges. In a large, predominately rural area, geography and transport can cause difficulties, but e-learning platforms are being developed, and more on-the-job training is being prescribed as the solution.

6.23   'The Demonstrator Project' is being piloted at present, which aims to highlight the link between financial success and training. The project involves fifteen tourism businesses with no previous involvement in training or who are at the low end of quality assurance. This project will also identify some real case studies and role models for use with other "learning sceptics."

Bristol - Tourism Skills Network South West (Tourismskillsnetwork.org.uk**)**

6.24   Catering and hospitality in the Bristol area shares many characteristics with Cardiff in terms of growth and redevelopment. There are some 1500 sustained vacancies in the sector locally and this led the Bristol Hotel Association to apply for support from the LSC and the SW RDA[15]. Funding was identified to allocate a budget for the Bristol Tourism Bureau to create a strategy for skills development in hospitality and tourism.

6.25   Initially, the concept of a hotel school was researched, but this was not considered to be a viable option – offering only a limited return on the sizeable investment required. Subsequently, a Tourism Task Force was set up for Bristol and the surrounding area, with an initial set up budget of £70,000. This was seen as a successful approach and the initiative has now grown to encompass all seven counties in the South West region. Each part of the region is run by a full time co-ordinator, funded through the RDA with match funding from LSC, Job Centre Plus, Business Link and European funds. The overall project currently receives £1.9m funding over three years, with £300,000 from the RDA. Each county has a steering group of employers and plans for each area have been very much employer driven. Employers offer in kind funding such as provision of meeting rooms, ambassadorial support and experienced managers and professionals as mentors.

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[15] Regional Development Agency

6.26   Subsidies are currently offered to companies for training, but in the context of pump-priming and these will be phased out gradually as the culture begins to change from one of dependency to a proactive HRD approach.

6.27   There is a significant range of activity supported under the initiative, from management development programmes to teacher involvement in curriculum development, vacancy bulletins on the Network website and targeted marketing activity. Tutor Tool kits have been devised, offering support to bring the curriculum to life and to encourage pupils to visit employers, for example. Each plan, however, is uniquely tailored to its local area.

6.28   In the rural hinterland, there is a plan for identifying opportunities for disseminated learning. A new scheme, the Virtual Learning Academy (aimed at Continuing Professional Development NVQ Level 4/5) is looking at providing tailored provision that best meets the needs of the individual. This may be a College for underpinning knowledge, a local chef placement for a week to develop vocational skills such as pastry work or butchery, then a work experience period with a specialist employer.

6.29   The challenge is to identify funding and gain accreditation for provision which lies outside specific LSC requirements. It is perceived that unitisation will be a major benefit when it is introduced.

6.30   Non-nationals and ethnic minorities are offered concentrated support in pockets of Bristol. For example, a growing Somalian population will be offered ESOL support and part time language support, once in employment.

7   Issues for Consideration

7.1   Some employers have been proactive in improving working conditions in the Hospitality and Catering Sector over the last few years. However these examples have not generally been used as a showcase to demonstrate the impact that changes can have in terms of retention, progression and improved bottom line. There are still too many cases where poor perception of the Industry is reality, where long hours and poor pay has not been identified as a barrier to potential recruits.

7.2   It appears that there is scope for an employer represented group, supported by the public sector agencies, with facilitation by a co-ordinator funded by the group. This could act as the catalyst for action on the part of the employer base in Cardiff.

7.3   A number of initiatives have been mentioned which could be examined further and developed as best practice. A more holistic and co-ordinated approach needs to be adopted for identifying a strategy for skills development in Hospitality and Catering in Cardiff.

7.4   Potential solutions include:

- Identifying a City Centre presence with facilities to offer real life practical experience. However, the proposal at UWIC for a Centre for International Hospitality Tourism and Leisure includes the development of a restaurant and kitchen facilities. There is the potential for Barry College to transfer its facilities to Barry Island and integrate further and higher education opportunities and to demonstrate real progression routes.

  In addition, discussion is taking place regarding the possibility of a catering training facility in the City Centre as part of the "Conference Cardiff" proposals, although this may be linked to higher-level management skills. These potential developments need to be considered in deciding on a course of action in order to avoid duplication.

- Developing further the facilities at satellite locations around Cardiff (Willows, Fitzalan, Llanedeyrn, Glyn Derw). Community development projects could lead to adult provision in the future. For example, Glyn Derw High School has a vision to develop the Community Learning Centre, the school's sports facilities and provide refreshments from an expanded kitchen area for all events which would be produced by pupils on a regular basis. A real community approach could hence be adopted. More taster days, special events and themed evenings could be organised and it is hoped that this would help regenerate latent interest in catering amongst adults whilst simultaneously breaking down barriers in the community. Willows High School would also like to

increase its provision, possibly by building an extra kitchen at a cost in the region of £16K.

- Increasing the provision of Work Based Learning through current providers. Capacity for MAs, NVQs and the new All Age Provision would need to be examined with regard to funding. This could only work if there was a drive to assist in recruitment. However, numbers for MAs and the All Age programme indicate that the issue is not so much with recruitment but with retention. (One provider indicated that their early leaver rate is currently 40%.) The focus must come back to employers and their ability to retain the skills through a more flexible approach to working conditions, hours and wages.

7.5   It has become evident through the interviews that there is a complex array of organisations involved in support for the sector. Springboard Wales, TTFW, Careers Wales, Job Centre Plus, Chamber of Commerce, Capital Regional Tourism plus the new Sector Skills Council for the industry are all involved in sector support. It appears that a more co-ordinated approach would be extremely beneficial in maximising the numerous good practice initiatives that are being developed, with a lead organisation able to link the various activities together.

7.6   There is a real need for partners with a vested interest in putting the mechanisms in place for improved recruitment and increased training, to pull together a co-ordinated approach to finding solutions rather than individual disjointed activity. A greater partnership between employers and providers is required. Other sectors, such as Aerospace, Electronics, Automotive and Call Centre industries, have managed to develop good examples of private public sector partnership. The proactive behaviour of a number of employers within each sector was the determining factor in achieving successful outcomes. The other deciding factor has been the identification of a lead body from the Public Sector to facilitate the partnership and assist in gaining funding and rolling out implementation plans.

7.7   The skills issues in Cardiff for hospitality and catering are common across the UK. But where a dynamic partnership, driven by employers, but underpinned by strong and co-ordinated public sector support has been developed, there are some excellent examples of success in beginning to change cultures and long standing attitudes amongst individuals and Businesses.

7.8   In most places, supply does not seem to be the issue. The problem is one of demand from potential learners/Businesses and a need for both changes in employment practices as well as a bold and sustained approach to Marketing, promotion and Education Business linkages.

7.9   In Cardiff, due to the lack of FE provision within Cardiff, there is a need to identify the way forward for increased exposure for post 16 off site learning. Opportunities must be explored for utilising facilities currently available within Cardiff.

8   Conclusions

8.1   Skills and labour shortages are present in the catering and hospitality sector in Cardiff, but they are not recognised across all businesses or all occupations.

8.2   It should be recognised that there will be a significant proportion of lifestyle or part-time businesses in the sector, which may have no plans to expand their business or recruit new staff. In addition, many businesses employ unskilled, part-time staff such as students, who are currently in plentiful supply.

8.3   There is a significant difference between the needs of full and part-time staff. Background research suggests that part-time staff are more likely to be satisfied with their job and have lower expectations of training or progression. The employer survey showed that 75% of hard to fill vacancies in Cardiff were for full-time posts. Hence it may be these areas that merit most attention, as it is these that exhibit most recruitment difficulties, but may also be where effort can bring about lasting effect.

8.4   Skills shortages are most noticeable for key staff, such as chefs/cooks and managers. Labour shortages are more common for waiters and waitresses, catering assistants and chefs/cooks.

8.5   Levels of training are comparatively low across the sector, yet more than half of all employers feel that their current level of training is adequate.

8.6   Training is heavily driven by legislation, especially in the pub / bar sector, implying that restaurants and hotels may be more proactive about developing their staff for the sake of business aims.

8.7   Current provision for catering training in Cardiff is lacking in terms of further education and fragmented in other areas. Work-based learning is heavily private-sector led and some practical approaches to delivery have been developed by partnerships of employers and private training providers.

8.8   Some pockets of good practice have been developed, such as the catering training facility at the Willows High School. These are further enhanced through the shared access allowed under the Collegium initiative.

8.9   Whilst it is acknowledged that the industry needs more skilled entrants and ongoing development for existing staff, it has not been clear what form the relevant provision should take. Some pro-active intervention by the Welsh Assembly Government in establishing a statutory framework of qualifications required for employment in the sector would enhance the importance of this sector and create a better profile. This

action would also replicate the situation that exists in other areas of employment such as the Caring, Construction and Engineering sectors.

8.10   It is unlikely that a training restaurant or hotel would provide a viable means of addressing the issues. Employers voice a preference for training in the workplace and are reluctant to release staff for training off site.

8.11   A network approach is likely to offer a more successful means of meeting industry need. By bringing together interested employers, providers and relevant support agencies, a virtual training academy can be established. Subject to sufficient funds being secured, this could offer a mix of provision in different settings, offered to employers on the basis of actual identified need and in circumstances which fit with the smooth and effective running of their business.

8.12   Sixty percent of employers expressed support for the idea of businesses getting together to share training, implying theoretical support for a network approach.

9   Recommendations

9.1   Bring together all parties with an active interest in learning in and for the catering sector in Cardiff, to investigate the creation of a training association. This would need to be employer led, but would be supported and facilitated by the public sector and possibly hosted by the CCET. It would also need to bring together the existing but currently unconnected initiatives that are being developed by a number of agencies and partnerships across the sector. If successfully established, the association would develop a coordinated strategy for developing the sector in Cardiff, incorporating:

- Employer-led training, commissioned to meet identified need

- Joint marketing of the sector to potential entrants

- Improved relationships between industry and education, including school visits, taster sessions for interested students and working with Careers Wales to provide enhanced work experience and work placement. Mentoring could also be used to develop individuals showing particular interest or promise.

- A strategy to roll out awareness of the need for training, from a nucleus of committed employers within the association, to their less enlightened colleagues elsewhere.

- Joint applications for external finance, to fund short courses and other identified needs of the group.

- A co-ordinated approach to providing underpinning knowledge, from age 14 to adult, involving all provider sectors and including clear progression routes.

- Bringing food education into the curriculum through developing materials for inclusion across existing subject areas.

- Harnessing existing talent, especially amongst chefs, to introduce a mentoring scheme for employees and students at all levels.

9.2   Organise a moderated workshop session for all interested parties to discuss the above and other conclusions of this report. Attendees should include major employers and training providers, along with members of the CCET and other potential stakeholders.

9.3   Investigate methods of converting part-time staff in the industry into full-time employees. In most cases this will require being able to demonstrate a valid and transparent career path, along with attractive packages of pay and conditions.

9.4   Improve access to catering learning for labour market returners and the unemployed. Support Jobcentre Plus in subsidising employers to take on and train new entrants or returners.

9.5   Strengthen ESOL provision for members of ethnic minority communities or non-nationals wishing to enter the catering and hospitality sector. This should include technical vocabulary relating to industry basics, such as health and safety, food hygiene and food preparation.

9.6   Increase demand for learning by marketing to employers the links between employing skilled staff and increased profitability.

9.7   Investigate supply-chain approaches to delivering a learning message to Asian and Oriental restaurant businesses. By working with relevant suppliers, it may be possible to access non-traditional learners in a culturally sympathetic manner.

9.8   Build on the Collegium principle to develop shared access to existing facilities for the wider community. Subject to access constraints, arrange community taster sessions in catering learning, with the potential to progress onto mainstream learning programmes.

9.9   Examine the delivery of management and entrepreneurship training for catering students, given the fact that 60% of businesses surveyed in Cardiff were independently owned.

9.10   Visits to South West of England, Scotland and Dublin are highly recommended. These areas have seen significant investment by the Governments (They have realised the major risk in not investing), and have all had high levels of employer involvement and leadership. They have all had a dynamic involvement from a partnership made up from the Public Sector, and a lead organisation (usually the Tourist Board or an independent arm of the Tourist Board, engaged in driving forward the activities within the plans.

9.11   Revisit the Hospitality Bank concept, to determine whether the facility could be reinstated.

10 Proposed Action Plan for Catering Development in Cardiff

Rec. No	Action	Responsibility	Timescale
Strategic			
1	Convene a facilitated half-day workshop session for all catering sector stakeholders in Cardiff. Issues to be considered in the workshop need to reflect the real issues, and all involved made aware of these in preparation for the event. Facilitation of the event would need to be done by a skilled and preferably high profiled individual.	CCET / CCET Working-Group	Sep 2004
2	Create a working group led by the CCET to: • Act on results of the workshop, • To action this research • To bring together existing initiatives in Cardiff	CCET	Sep 2004
3	Develop a consensus model for the best approach to catering learning, based on the following criteria: • A virtual or network approach – not another training centre • Primarily work-based learning, with underpinning knowledge provided off-site • Incorporating existing providers from across all sectors	CCET / Employers / ELWa / Other Partners	Sep – Dec 2004
4	Arrange fact-finding visits to Bristol to capitalise on best practice developed in the Tourism Skills Network South West Initiative. Further links to other cities such as Dublin and Glasgow could also be explored.	CCET Working-Group	Sep – Dec 2004
Demand Side			
5	Design a campaign to market to catering employers the advantages of continuous training for all employees, in terms of profitability, employee retention and improved levels of customer service and satisfaction. • Consider use of existing or extended TTFW best practice case studies to illustrate benefits		Dec 2004 – Mar 2005
6	Develop an employer network to discuss recruitment and training issues and to consider jointly commissioning provision	Employers / CCET Working Group	Apr 2005 onwards
7	Work with Careers Wales to create a tailored approach to delivering structured	Employers / CCET	Apr 2005 onwards

	work experience and work placements in catering. Placements should be selected so as to encourage young people to enter the industry.	Working Group / Careers Wales	
8	Identify a pool of chefs and other professionals willing to act as mentors for students at 14+	Employers / CCET Working Group / Careers Wales	Apr 2005 onwards
9	Investigate the potential for developing an international exchange programme for chefs and restaurateurs, possibly through the European Chef Network	CCET Working Group	Apr 2005 onwards
10	Approach ethnic product suppliers with a view to delivering a learning message to Asian and Oriental restaurant businesses through the supply chain.	CCET Working Group / ELWA	Apr 2005 onwards
Supply Side			
11	Assess the viability of encouraging existing part-time catering employees to develop their careers into full-time employment in the sector. Consider also any additional support required, such as caring support, to facilitate change	CCET Working Group / ELWA / Careers Wales	Apr 2005 onwards
12	Investigate means of improving access to catering learning for labour market returners or the unemployed	CCET Working Group / ELWA / Jobcentre Plus	Apr 2005 onwards
13	Revisit the Hospitality Bank concept, to determine the viability of reinstating the programme	CCET Working Group / Cardiff County Council	Apr 2005 onwards
Provision			
14	Build on the Collegium principle to develop shared access to existing facilities for the wider community. Subject to access constraints, arrange community taster sessions in catering learning, with the potential to progress onto mainstream learning programmes.	CCET Working Group	Apr 2005 onwards
15	Investigate alternative sources of funding / pump priming funds for provision of short courses tailored to the expressed needs of the employer network. Courses should become self-sustaining as momentum builds	CCET Working Group	Jul 2005 onwards
16	Work with the 14-19 Learning Network to identify Learning Pathways for those with an interest in the catering sector.	CCET Working Group	Jul 2005 onwards
17	Strengthen ESOL provision for members of ethnic minority communities or non-nationals wishing to enter the catering and hospitality sector. This should include technical vocabulary relating to industry basics, such as health and safety, food hygiene and food preparation.	CCET Working Group / ELWa	Sep 2005
18	Design and deliver entrepreneurship / management learning modules for new entrants or existing employees, to encourage self-employment and new business formation	CCET Working Group / Coleg Glan Hafren / ELWa	Sep 2005

11 Appendix 1 Employer Survey Questionnaire

B2397 CARDIFF CATERING SKILLS SURVEY   REVISED   QUESTIONNAIRE (20/02/04)

RESPONDENT NAME _____

RESPONDENT JOB TITLE _____

COMPANY NAME   _____

COMPANY ADDRESS_____

_____

_____

POSTCODE _____

TEL NO.   _____

SIZE

1-10 employees   1
11-24 employees   2
25+ employees   3

ASK TO SPEAK TO PERSON RESPONSIBLE FOR TRAINING AND RECRUITMENT AT THAT ADDRESS (PROMPT IF NECESSARY: Managing Director, Owner, Personnel Director, Personnel Manager, Human Resources Manager)

ASK RESPONDENT

Good morning/afternoon. My name is ……………… from Beaufort Research. We recently wrote to you regarding a survey we are conducting on behalf of ELWa to consider whether a new catering training facility in Cardiff is feasible.

S1   Can I just check, are you the person with overall responsibility for personnel and training at this location?

Yes	**CONTINUE**
No	**ASK TO SPEAK TO PERSON RESPONSIBLE**

Would you mind taking part in the study? The interview will take approximately 15 minutes. If it's not convenient to speak to you now, we can call back.

I declare that this interview was conducted within the Code of Conduct of the Market Research Society and that the respondent was unknown to me. I declare that all information given to me must be kept confidential.

Interviewer Sign   ....   Date ....

Interviewer Print   ....

SECTION A – COMPANY BACKGROUND

READ OUT: Firstly, a few questions about your business

Q1 How would you describe your business?
(**SINGLE CODE)**

Hotel	**Q2**
Restaurant	**Q3**
Bar	**Q5**
Canteen / Catering	**Q6**
Other (please specify)	

_____

Q2 How would you describe your hotel?   ()
(READ OUT – SINGLE CODE)

Bed and breakfast or guest house	1
Budget hotel	2
Mid range hotel	3
Luxury hotel	4 **Q7**

Q3 How would you describe your restaurant?   ()
(READ OUT- SINGLE CODE)

Fine dining	1
Popular dining	2
Fast food or takeaway	3
Cafe	4
Coffee bar	5

Other (PLEASE SPECIFY)

_____

Q4

Q4 And what type of food do you (mainly) serve?
(READ OUT- SINGLE CODE)   ()()

Asian (eg Indian)	01
Oriental (eg Chinese, Thai, etc)	02

Afro-Caribbean	03	
Central and Southern American (eg burgers, Tex-Mex)	04	
European (eg Welsh, British, French)	05	
Other (PLEASE SPECIFY)	**Q7**	

_____

Q5   How would you describe your pub, bar or club? Is it...?   ()
(READ OUT – SINGLE CODE)

Managed	1	
Tenanted	2	
Freehold	3	**Q7**

Q6   How would you describe your main type of catering?   ()
(READ OUT – SINGLE CODE)

Fine dining	1	
Production kitchen (eg school canteen)	2	
Take away or canteen (eg works canteen)	3	**Q7**

_____

Q7   Is the business at this site..?
(**SINGLE CODE**)

A single proprietorship (that is, owned by one person)	1
A partnership	2
A private limited company	3
A public limited company	4
An in-house public sector organisation	5
Something else (PLEASE SPECIFY)	**Q8**

_____

Q8   And is the business at this location..?
(READ OUT – SINGLE CODE)   ()

Independent	1	**Q10**
Part of a small chain	2	**Q9**
Part of a larger group	3	**Q9**

ROUTE

Q9   Are the major decisions regarding the recruitment and training of staff taken at this location or elsewhere? **(SINGLE CODE)**   ()

At this location	1	
At another location that is not your Head Office	2	
At Head Office	3	
Depends	4	
Don't know	5	**Q10**

SECTION B – YOUR WORKFORCE AND THEIR SKILLS

READ OUT: I'd now like to ask you some questions about your workforce.

Q10   How many **permanent** staff, including <u>yourself and any unpaid staff</u>, do you employ in the following occupations? Can I remind you that all responses are completely confidential and results will be anonymous.
     (WRITE IN NUMBER BELOW)

     _____

Chefs & cooks	1	()
Waiters & waitresses	1	()
Bar staff	1	()
Kitchen porters & catering assistants	1	()
Cleaners & domestics	1	()
Managers (eg publicans, club stewards, restaurant & catering managers, hotel & accommodation managers)	1	()
Receptionists, housekeepers & hotel porters	1	()
Sales assistants	1	()
Other hospitality staff	1	()
Other non-hospitality staff	1	()
Q11		

Q11   Thinking about your workforce generally, is there a gap between the skills of current employees and those your organisation needs to meet its business requirements?
     ()

Yes	1	
	Q12	
No	2	
Don't know	3	
	Q14	
		ROUTE

Q12   In which of the following types of occupation/s is there a skills gap? PROBE: Any others?
     (READ OUT OCCUPATIONS WHICH APPLY)

A. Chefs & cooks	1	()
B. Waiters & waitresses	1	()
C. Bar staff	1	()
D. Kitchen porters & catering assistants	1	()

E. Cleaners & domestics	1	()
F. Managers	1	()
G. Receptionists, housekeepers & hotel porters	1	()
H. Sales assistants	1	()

Other (PLEASE SPECIFY)

()	()

Q13 _____

Q13 **What particular skills, qualifications or experience are lacking? PROBE: Any others?**
(DO NOT PROMPT – CAN MULTICODE)

Ability to follow instructions	1	()
Communication skills	1	()
Customer care	1	()
Developing staff	1	()
Entrepreneurship	1	()
Financial management	1	()
Flexibility	1	()
Food hygiene	1	()
Food preparation & cooking	1	()
Handling payments	1	()
Health & safety	1	()
Initiative	1	()
Innovation and creativity	1	()
ICT	1	()
Kitchen management	1	()
Language skills	1	()
Operational management	1	()
People management	1	()
Quality management	1	()
Sales and marketing	1	()
Don't know	1	()

Other (PLEASE SPECIFY)

()	()

Q14 _____

Q14 **What effect, if any, has the lack of skills had on your business?**
(DO NOT PROMPT – CAN MULTICODE)

Limited our levels of customer service
Restricted the range of goods and services that we can offer
Affected our business performance
Increased overtime for skilled employees
Reduced the hours that we can open
None
Don't know

Other (PLEASE SPECIFY)

_____

Thinking about new staff that you have taken on during the last year.

Q15   Have you experienced difficulties in recruiting any new staff?

Yes	1 **Q16**	
No	2	
Don't know	3 **Q19**	

Q16   In which occupations have you experienced difficulties?

A. Chefs & cooks	1	()
B. Waiters & waitresses	1	()
C. Bar staff	1	()
D. Kitchen porters & catering assistants	1	()
E. Cleaners & domestics	1	()
F. Managers	1	()
G. Receptionists, housekeepers & hotel porters	1	()
H. Sales assistants	1	()
Other (PLEASE SPECIFY)	()	()

Q17   _____

Q17   Why has this vacancy/have these vacancies proved hard to fill? **PROMPT** Anything else?
(DO NOT PROMPT – CAN MULTICODE; CODE ALL MENTIONED)

Lack of applicants with required qualifications	1	()

Q18a

Lack of applicants with required skills	1	()
Lack of applicants with required personal & social qualities	1	()
Lack of applicants with required working experience	1	()

Q18

Lack of applicants with Welsh language skills	1	()
Lack of applicants interested in this type of work	1	()
Job entails shift work/unsociable hours	1	()
Lack of promotion opportunities	1	()
Higher wages/salaries offered by other employers	1	()
Potential applicants have poor perception of this area	1	()
Remote location/poor public transport	1	()
People reluctant to relocate to this area	1	()
High cost/lack of accommodation	1	()
General lack of applicants	1	()
Don't know	1	()
Other (PLEASE SPECIFY)	()	()
_____	()	()

Q19

Q18a   Which particular qualifications did applicants for this vacancy lack?   (Unprompted)

NVQ in Food Preparation and Cooking	**Q18b**
NVQ in Food & Drink Service	
NVQ in Bar Service	

NVQ in Hospitality Service
NVQ in Catering Service
CIEH Certificate in Food Safety
RIPHH Certificate in Food Hygiene

Other

Q19
Don't Know

Q18b At what level? (Unprompted)

NVQ1
NVQ2
NVQ3
Basic
Intermediate
Advanced

Other
Don't Know

Q18
hat particular skills or experience did applicants for this vacancy / these vacancies lack?
(DO NOT PROMPT – CAN MULTICODE)

Ability to follow instructions	1	()
Communication skills	1	()
Customer care	1	()
Developing staff	1	()
Entrepreneurship	1	()
Financial management	1	()
Flexibility	1	()
Food hygiene	1	()
Food preparation & cooking	1	()
Handling payments	1	()
Health & safety	1	()
Initiative	1	()
Innovation and creativity	1	()
ICT	1	()
Kitchen management	1	()
Language skills	1	()
Operational management	1	()
People management	1	()
Quality management	1	()
Sales and marketing	1	()
Don't know	1	()
Other (PLEASE SPECIFY)	()	()

Q19

Q19   Were the hard to fill vacancies mainly part-time or full-time?

Full-time	1	()
Part-time	()	()

Don't know _____   1   ()
Q20

SECTION E – TRAINING

A few questions about training.

Q20 Approximately what proportion of your <u>employees</u> have been involved in training and development activities that were funded or arranged by your company in the last year? **(SINGLE CODE)**

None	1
Less than 25%	2
25% - 49%	3
50% - 74%	4
75% - 99%	5
All employees	6
Don't know	7

Q21

INSTRUCTION: REFER BACK TO Q20 – IF NONE (CODE 1) OR DON'T KNOW (CODE 7) SKIP TO Q26; ALL OTHERS, CONTINUE

Q21 What types of training did your <u>employees</u> undertake over the past year? Was it…?

(READ OUT – CAN MULTICODE)

On-the-job	1	() Q22
Off-the-job	1	() Q23
Both	1	() Q22
Don't know	1	() Q24

Q22 Was this on the job training mostly run by..?
(READ OUT – SINGLE CODE)   ()

A member of staff	1	Q25
An external training provider, that is a college or a training company	2	
Both equally	3	Q24
Don't know	4	Q26

Q23 Was this off the job training mostly run by..?

(READ OUT – SINGLE CODE)   ()

A member of staff	1	**Q25**
An external training provider, that is a college or a training company	2	

Both equally	3	**Q24**
Don't know	4	**Q26**

Q24   Is/are the training provider/s you usually use based locally (that is within 25 miles or so) or further afield?

Local	1	()
Further afield	2	()
Don't know	3	() **Q25**

Q25   Which of the following types of courses has your company used in the last 12 months or so? **(READ OUT – CAN MULTICODE)**

Distance learning	1	()
Short courses	1	()
Full-time courses	1	()
Part-time courses	1	()
Mentoring	1	()
E-Learning / Distance Learning	1	()
Other (PLEASE SPECIFY	()	()
_____	O	O

Q26

Q26   In which of the following skills areas have your employees undertaken training over the last 12 months? **(READ OUT – CAN MULTICODE)**

Communication skills	1	()
Customer care	1	()
Financial management	1	()
Food hygiene	1	()
Food preparation & cooking	1	()
Handling payments	1	()
Health & safety	1	()
ICT	1	()
Induction training	1	()
Kitchen management	1	()
Language skills	1	()
Operational management	1	()
People management	1	()
Quality management	1	()
Sales and marketing	1	()
Don't know	1	()
_____		
Other (PLEASE SPECIFY)	()	()

Q27

Q27   Are there any factors which limit or present a barrier to the amount of training your organisation does? **(DO NOT PROMPT – CAN MULTICODE)**

Cost of training in local area	1	()
Cost of training outside of the local area	1	

Quality of training offered by providers   1   ()

The times of day at which courses are run in local area or providers are prepared to train   1
()

The times of day at which courses are run outside of the local area or providers are prepared to
train

Do not have experienced staff to deliver training   1   ()

Cannot afford staff to have time off for training   1   ()

No one in company is skilled at identifying staff's training needs   1   ()

Concerns over trained staff taking jobs in other companies   1   ()

Have never been able to prove benefits of training to the business   1   ()

Cannot find the training needed in the local area   1   ()

Cannot find the training needed outside of the local area

Staff are not interested in training or developing their skills   1   ()

Training courses take too long to complete   1   ()

None of the above – training is adequate   1   ()

None of the above – training is not needed

Don't know   1   ()

Other (PLEASE SPECIFY) _____   )   ()

Q28

Q28   What kind of improvements would you like to see in the training available to you?

(DO NOT PROMPT – CAN MULTICODE)

More training available in the workplace   1   ()

Better quality training offered by providers   1   ()

The times of day at which courses are run in local area

The times of day at which courses are run outside of the local area

The times of day at which providers are prepared to train   1   ()

Training should be available free of charge   1   ()

More bite-sized courses   1   ()

None of the above – training is adequate   1   ()

Don't know   1   ()

Other (PLEASE SPECIFY)   ()   ()

Q29 _____

Q29   To what extent do you agree or disagree with the following statements about training?
Q30

READ OUT	Agree Strongly	Agree Slightly	Disagree Slightly	Disagree Strongly	Don't know	
NVQs fit well with our training needs	1	2	3	4	5	()
School leavers are usually not work ready	1	2	3	4	5	()
College leavers are usually not work ready						
I prefer training to be carried out on the job	1	2	3	4	5	()
Legislation drives most of our training	1	2	3	4	5	()
It is difficult to organise work experience within our business	1	2	3	4	5	()
Businesses should get together more to share training	1	2	3	4	5	()

READ OUT: Finally a few questions about Cardiff and your market

Q30   Over the next 12 months, would you say that the market for hospitality in Cardiff is likely to:
(READ OUT – SINGLE CODE)

Grow rapidly	1
Grow a little	2
Stay the same	3
Decline a little	4
Decline rapidly	5
Don't Know	6

Q31

Q31   Finally, what approximately is the current annual turnover of this business at this location?
(SINGLE CODE - PROMPT IF NECESSARY WITH SIZE BANDS)   ()

Less than £100,000 per annum	1
£101,000 - £250,000 per annum	2
£250,001 - £500,000 per annum	3
Over £500,000 per annum	4
Refused	5
Don't know	6

THANK AND CLOSE

12 Appendix 2 – Survey Technical Report

		TOTAL	% of contacts
1	No Answer/answer phone	86	17
2	Engaged	7	1
3	Told to call back later/named contact temporarily unavailable	193	39
A	Interview	102	20
B	Refusal	15	3
C	Ineligible	12	2
D	Number invalid/unobtainable	41	8
E	Wrong number/Not known	1	0
F	Moved/Ceased trading	1	0
X	Relevant person unavailable in survey period	4	1
	Duplicate	1	0
	Not contacted	37	7
		500	

13 Appendix 3. Stakeholders Consulted

Name	Organisation
Mal Davies	Willows High School
Angus Dunphy	Fitzalan High School
Diane Jeremy	Llanedeyrn High School
Dewi Jones	Glyn Derw High School
Diana James	TTFW
Malcolm Charnley	Coleg Glan Hafren
Paul Halstead	Barry College
Eleri Jones	UWIC
Alison Godolphin	LEA Schools Service
Angela McGuire	HCTC
Head of Training	AWEMA
Geraint Lewis	Cardiff Jobcentre Plus
Grainne Wilson	Careers Wales
Simon Cartwright	ELWa
Brian Venables	Chamber of Commerce
Gareth Edwards	Springboard
Colin Hynd Payne	Careers Wales
Peter Cole	Capital Regional Tourism
Sheridan Jeffrey	Spice Project