

3.8 Tourism

Executive summary

This section summarises the main findings for the Tourism sector that are detailed in the following chapter. Because of the scale and importance of Tourism to the region, the findings are presented separately for each of the four key sub-sectors that make up the sector. For reference, the summary highlights the source of each finding. It should be noted that the summary only contains the most significant findings and recommendations. Additional information and much further detail is given in the chapter.

Sector overview: Sub-sections 3.8.1 and 3.8.2

- ❖ For this study, the Tourism sector has been defined in terms of its four key sub-sectors;
 - Hospitality;
 - Sports and recreation;
 - Cultural heritage; and
 - Travel, tourism and events.
- ❖ Following this overview section and the sub-sections on skills needs and strategies, the findings of the research are reported individually for each of these sub-sectors.
- ❖ The Tourism sector as a whole is of critical importance to the economy of the region, providing a major source of employment and prosperity.
- ❖ The sector employed c.188,000 directly and a further c.135,000 indirectly in 2001. Of the 188,000 the four sub-sectors each accounted for;
 - Hospitality – 130,000;
 - Sports and recreation – 40,000;
 - Cultural heritage – 12,000; and
 - Travel, tourism and events – 6,000.
- ❖ The significance of the sector overall and its various sub-sectors varies markedly between different parts of the region, being most significant in Cornwall, Devon and Somerset, where it is often the cornerstone of the economy.
- ❖ It is estimated that the sector contributed c.10% of the South West's GDP in 2001, rising to over 20% in Cornwall.
- ❖ The sector is dominated by SMEs, though a few large businesses account for a disproportionate number of employees.
- ❖ The overall future economic prospects of the sector are very good, with high predicted growth rates in the future.
- ❖ However, these growth rates will only be achieved opportunities if the sector remains competitive, meets the rising expectations of customers and, most crucially, addresses its skills shortages.

Sector skills needs: Sub-section 3.8.3

- ❖ The sector faces five main issues in terms of its skills demands;
 - How to access information on relevant training and learning;
 - Enabling SMEs to access suitable training provision;
 - Qualifications and skills gaps;
 - Linkages to mainstream education; and
 - Information on support required from the Tourism Skills Network.
- ❖ Engaging employers in the training process is a key issue for the future with many currently seeing little value in training outlay.
- ❖ A primary reason for this perception is the extremely high level of staff turnover. This is endemic throughout the sector – partially as a result of its seasonal nature, but also because of the terms and conditions.

- ❖ Specific occupations that have been identified as being hard to fill include;
 - Chefs;
 - Food/beverage staff;
 - Housekeepers;
 - Night staff; and
 - Front of house.
- ❖ Across the sector there are concerns about the quantity and quality of training and about its ability to help the sector maintain its market position.
- ❖ In common with many other sectors, Tourism faces a mixture of skills gaps: for skills specific to the sector and also more generic skills gaps.

Hospitality: Sub-section 3.8.4

- ❖ Hospitality is easily the largest sub-sector in the Tourism sector. It also faces the greatest problems in terms of staffing and skills.
 - ❖ Recruitment and retention are major issues resulting in a forecast of 26-35,000 extra staff being needed by 2010. These jobs will be predominantly for;
 - Waiters;
 - Bar staff;
 - Catering assistants
 - Chefs and cooks; and
 - Kitchen porters.
 - ❖ Industry specific vocational skills shortages identified include;
 - Food and drink service; and
 - Foreign languages.
 - ❖ However, the most common skills shortages are in more generic areas;
 - Customer service;
 - Communication skills;
 - Time keeping;
 - Personal appearance; and
 - Attitude among school leavers.
 - ❖ The Hospitality Training Foundation has a Workforce Development Plan for 2001-2005 which identifies that there needs to be greater uptake of industry recognised qualifications (such as NVQs).
- ❖ Forty five NVQs were identified on the Qualification Curriculum Authority's Framework as being specifically relevant to the sub-sector.
 - ❖ These were at levels 1 to 4 offering a potentially good range of progression opportunities across the sub-sector.
 - ❖ Thirty eight of the forty five NVQs were provided in the region in 2001-02, either in the workplace or in FE/HE colleges.
 - ❖ This provision was spread across the region, broadly reflecting the distribution of employees.
 - ❖ In 2001-02 there were 7,555 work-based learners on NVQs/MAs related to the sector and a further 2,851 in FE/HE colleges: a significant total in terms of meeting the demand for extra staff up to 2010.
 - ❖ Of the 10,406 total learners in the sub-sector, virtually all were at either level 2 (64%) or 3 (35%).
 - ❖ Thus NVQ provision in the region is broadly adequate for the sub-sector, but needs reviewing in relation to;
 - Progression opportunities at levels 4 and 5;
 - Levels of provision for NVQs identified as addressing skills gaps; and
 - Geography.
 - ❖ The findings were "validated" with a range of employers and stakeholders drawn from across the sector.
 - ❖ The key recommendations that emerged from the validation exercise for the Hospitality sector were;
 - **Reduced paperwork;**
 - **(Re-) marketing/branding of NVQs;**
 - **Improved quality of training/assessment;**
 - **Changes to funding; and**
 - **Amendment of the NVQs themselves** (i.e. different formats, delivery methods, etc.).
 - ❖ The recommendations fit with the aims of the South West Tourism Skills Network and contribute to the National Skills Strategy.

Sports and recreation: Sub-section 3.8.5

- ❖ Sports and recreation is a very diverse sub-sector having six main constituent parts: sports/recreation, exercise and fitness, playwork, the outdoors, leisure attractions and the caravan industry. All of these are covered by the study except playwork which is better covered by Care.
- ❖ Within sports and recreation there are significant skills gaps for;
 - Teaching staff;
 - Operational staff; and
 - Managers.
- ❖ Outdoors sector has skills gaps for;
 - Development training skills;
 - Marketing;
 - Customer service; and
 - Experience and judgement.
- ❖ Within attractions key skills gaps are;
 - Customer care;
 - Health and safety;
 - Catering; and
 - IT.
- ❖ Exercise and fitness skills gaps are;
 - Specific technical (i.e. instructors);
 - Customer service;
 - IT; and
 - Communications.
- ❖ Seventeen NVQs were identified on the Qualification Curriculum Authority's Framework as being specifically relevant to the sub-sector.
- ❖ These were mainly at levels 1 to 3 offering a range of progression opportunities within these levels.
- ❖ Ten of the seventeen NVQs were provided in 2001-02, either in the workplace or in FE/HE colleges.
- ❖ This provision was spread across the region, broadly reflecting the distribution of employees.
- ❖ In 2001-02 there were over 600 work-based learners on NVQs/MAs related to the sub-sector and a further 500 in FE/HE colleges.
- ❖ This total of 1,127 was a reasonably significant total in terms of the size of the workforce in the sub-sector.
- ❖ Of the 1,127 total learners in the sub-sector, virtually all were at either level 2 (71%) or 3 (26%).
- ❖ Thus NVQ provision in the region is broadly adequate for the sports and recreation sub-sector, but needs review in terms of;
 - Provision for the other key sub-areas (i.e. exercise and fitness, spectator control, outdoors, attractions and caravans);
 - Provision and progression opportunities at levels 4/5;
 - Levels of provision for NVQs identified as addressing skills gaps; and
 - Geography.
- ❖ The findings were “validated” with a range of employers and stakeholders drawn from across the sector.
- ❖ The key recommendations that emerged from the validation exercise for sports and recreation were;
 - **Work with Sports governing bodies to develop industry relevant NVQs;**
 - **Increase provision of NVQs in specific areas (ie. coaching);**
 - **Promote NVQs among employers and employees; and**
 - **Amended coverage of specific NVQs to match employers needs (i.e. caravan park operations).**
- ❖ These recommendations *do not* fit with the relevant sector WDP reviewed as these made little reference to NVQs. Nonetheless, they do contribute to the objectives and aims of the Government's National Skills Strategy.

Cultural heritage: Sub-section 3.8.6

- ❖ Cultural heritage covers a diverse range of organisational activities from museums and galleries to zoos, industrial and craft premises.
 - ❖ The workforce is relatively highly qualified and skilled. However, assessment of the sub-sector is hampered by a lack of information on the skills issues being faced.
 - ❖ On the basis of available information, the key industry specific vocational skills gaps are for;
 - Archaeologists;
 - Book restorers;
 - Curators;
 - Conservation; and
 - Crafts.
 - ❖ However, the major skills issues faced by the sub-sector are management and generic skills gaps which are central to its future.
 - ❖ The sub-sector faces very different challenges from other Tourism sub-sectors such as managing volunteers, applying for funding and delivering government targets.
 - ❖ The Cultural Heritage NTO is committed to the use of vocational training in the workplace.
 - ❖ Seven NVQs were identified on the Qualification Curriculum Authority's Framework as being specifically relevant to the sub-sector.
 - ❖ These were at levels 2 to 5 offering potentially reasonable progression opportunities.
 - ❖ Three of the seven NVQs were provided in 2001-02, either in the workplace or in FE/HE colleges.
 - ❖ This provision was very limited: there being only seven work-based learners on NVQs related to the sub-sector and a further one in an FE/HE college.
 - ❖ The total of eight is insufficient for the size of the workforce in the sub-sector and its desire to grow.
- ❖ NVQ provision in the region is inadequate for the Cultural heritage sub-sector, needing review in terms of;
 - Provision of nationally available NVQs;
 - Levels of provision for NVQs identified as addressing skills gaps; and
 - Geography.
 - ❖ The findings were “validated” with a range of employers and stakeholders drawn from across the sector.
 - ❖ The key recommendations that emerged from the validation exercise for cultural heritage were;
 - **Overcoming the perception that NVQs are “entry level qualifications” that are “not for the CH sector”;**
 - **Increase provision of NVQs in missing areas;**
 - **Promote NVQs among employers and employees; and**
 - **Amended coverage of specific NVQs to increase ownership and match employers needs.**
 - ❖ These recommendations fit with the CT NTO WDP. They also contribute to the objectives and aims of the Government's National Skills Strategy.

Travel, Tourism Events: Sub-section 3.8.7

- ❖ TTE is also a diverse sub-sector covering travel agents, Tourist Information Centres, events organisers and exhibitors.
 - ❖ Recruitment and retention are again major issues in this sub-sector.
 - ❖ The WDP for the sub-sector identifies two specific issues that need to be tackled in associated with retention: “churn” and “leakage”.
 - ❖ It also identifies specific skills demands for new entrants;
 - IT;
 - Learning and performance;
 - Working with other people; and
 - Communications.
 - ❖ And for practitioners and supervisors;
 - Customer relations;
 - Administration;
 - Face to face selling;
 - Management and
 - Marketing skills.
 - ❖ The WDP also contains a series of actions for ensuring a wider take up of generic, personal and elementary qualifications such as NVQs.
 - ❖ Thirty NVQs were identified on the Qualification Curriculum Authority’s Framework as being specifically relevant to the sub-sector.
 - ❖ These were at levels 2 to 4 offering potentially reasonable progression opportunities.
 - ❖ Eleven of the thirty NVQs were provided in 2001-02, either in the workplace or in FE/HE colleges.
 - ❖ In total there were nearly 450 work-based learners on NVQs related to the sub-sector and a further 50 in FE/HE colleges.
 - ❖ The total of 500 is broadly sufficient for the travel agent sub-sector, given the relatively small size of the workforce in the sub-sector and its anticipated growth. However it is insufficient for the other parts of the sub-sector.
- ❖ As such provision in the region does not address many of the sub-sectors skills issues and, as such, needs to be reviewed in terms of;
 - Levels of provision for NVQs identified as addressing skills gaps;
 - Missing areas where demand is currently being met by internal training or other external training (i.e. TICs, events and exhibitors); and
 - Geography.
 - ❖ The findings were “validated” with a range of employers and stakeholders drawn from across the sector.
 - ❖ The key recommendations that emerged from the validation exercise for Travel, Tourism and Events were;
 - **Increase provision of NVQs in missing areas;**
 - **Promote NVQs among employers and employees; and**
 - **Amended coverage of specific NVQs;**
 - **Work with companies in sub-sector to encourage use by matching NVQs to their needs.**
 - ❖ These recommendations fit with the TTENTO WDP. They also contribute to the objectives and aims of the Government’s National Skills Strategy.

3.8.1 Introduction

Due to the size, diversity and significance of the Tourism sector in the South West, this chapter follows a slightly different structure to the other chapters in the report.

The chapter begins with an overview of the sector in the region, providing a discussion of definitional issues and a brief examination of its economic characteristics and prospects. It then reviews the relevant tourism and skills strategies and sector strategy documents. The focus of this section is on the significance and role of NVQs in meeting the vocational skills needs of the sector.

The chapter then splits into four, examining individually each of the four key sub-sectors within the Tourism sector as a whole;

- Hospitality;
- Sports and Recreation;
- Cultural Heritage; and
- Travel, Tourism and Events.

For each sub-sector the following issues are examined:

- The reported need for training and skills in the sector, based on the available research and data;
- Workforce development plans; and
- The current levels of NVQs provision in relation to any identified needs and gaps in workforce training provision.

3.8.2 Overview of the Tourism Sector in the South West

SWRDA's Working Paper on the Tourism and Leisure Sector describes how, in 1997, the sector was the second largest of the RDA's priority sectors in terms of employment and the fourth largest in terms of value of its output. The paper details how tourist spending sustains employment in tourist related services including retailing, catering and transport, all of which account for major proportions of expenditure. Employment in the sector is particularly important in Devon/Cornwall and Bournemouth/Dorset and Poole¹.

3.8.2.1 Definition of the Tourism Sector

The Working Paper also provides the following definition of Tourism²:

'All providers of visitor accommodation, as well as supporting services such as attractions, but excluding industries benefiting from tourism expenditure such as catering, transport and retail services, which only derive part of their income from tourist spending.'

However, the Tourism Sector Workforce Development Plan 2002-2003 provides slightly different definition³:

'All providers of visitor accommodation, as well as supporting services such as attractions, entertainment activities and catering services where they serve a predominantly tourist market.'

¹ Priority Sector Working Paper 8 – Tourism and Leisure. SWRDA 2000 p.3

² Priority Sector Working Paper 8 – Tourism and Leisure. SWRDA 2000 p.8

³ Tourism Sector Workforce Development Plan 2002-2003 – Tourism Skills Network South West p.3

The subtle difference between these two definitions is that the second includes 'catering services where they serve a predominantly tourist market'. In terms of analysis this difference is an important one. When assessing training provision, restaurants and pubs fall under the remit of the Hospitality Training Foundation, and are considered an integral part of the hospitality industry and the provision of vocational training in the hospitality sector. Therefore, it is understandable that the Tourism Skills Network South West have incorporated 'catering services where they serve a predominantly tourist market' into their definition. However, as stated by the Bostock report⁴, 'tourism' is defined by its market (i.e. customers), rather than the activity itself. As such, Hotels, Restaurants, Pubs and other hospitality services depend on 'tourist customers' (rather than business or local customers) to varying degrees. This means that when analysing employment and training statistics, it is not possible to differentiate between a Restaurant serving a predominantly tourist or non-tourist market. Therefore for the purpose of this exercise, Restaurants and Public houses are included in the definition of the Tourism Sector. This means that the analysis covers all qualifications relating to Restaurants and Pubs.

Thus the Tourism Sector and its four sub-sectors, as defined for this research incorporates the following SIC codes:

Table 3.8.1: SIC codes for the Tourism sector.

SIC Code	Tourism Sub-Sector
9232 : Operation of arts facilities	Cultural Heritage
9251 : Library and archives activities	Cultural Heritage
9231 : Artistic and literary creation etc	Cultural Heritage
9252 : Museum activities etc	Cultural Heritage
9253 : Botanical and zoological gardens etc	Cultural Heritage
5511 : Hotels and motels, with restaurant	Hospitality
5512 : Hotels and motels, without restaurant	Hospitality
5521 : Youth hostels and mountain refuges	Hospitality
5530 : Restaurants	Hospitality
5540 : Bars	Hospitality
5522 : Camping sites, including caravan sites	Sports and Recreation
5523 : Other provision of lodgings nec	Sports and Recreation
9233 : Fair and amusement park activities	Sports and Recreation
9234 : Other entertainment activities nec	Sports and Recreation
9304: Physical well-being ⁵	Sports and Recreation
9261 : Operation of sports arenas and stadiums	Sports and Recreation
9262 : Other sporting activities ⁶	Sports and Recreation
9271 : Gambling and betting activities	Sports and Recreation
9272 : Other recreational activities nec	Sports and Recreation
6330 : Activities of travel agencies etc nec	Travel Tourism and Events

As can be seen from this list, the Tourism sector is very diverse. Therefore the jobs, qualifications and skills needed in this sector are equally diverse.

⁴ Mapping Supply and Demand for Skills and 'the Skills Information Gateway' Bostock Marketing Group May 2002 p.51

⁵ Not included in the SWRDA definition, but is an important part of the Sports and Recreation Sector and is included in the SPIRITO definition of the sector.

⁶ Not included in the SPIRITO definition, but most closely fits the Sports and Recreation sub-sector.

3.8.2.2 Economic Characteristics and Prospects for the Sector

Tourism is critically important to the South West of England, providing a primary source of employment and prosperity. Likewise the South West is a major player in tourism within the UK, attracting more visitors than any other region outside London⁷.

In excess of 7.5%⁸ of all VAT registered businesses are in the tourism sector. Contribution to GDP from tourists is calculated as the sum of income from staying visitors (i.e. those who stayed one night or more), plus the income from day-trippers (i.e. those who visited but did not stay for one night or more). This equates to £9,002m, £4,523m from staying visitors (domestic visitors and overseas visitors) and £4,479m from day-trippers⁹. It is estimated that this represented 10%¹⁰ of the regions GDP in 2001. However, this calculation probably under-estimates the contribution of the leisure sub-sectors i.e. sports and recreation and travel, tourism and events.

Tourism accounts for 187,975¹¹ jobs directly in the sector as defined above. When indirect and multiplier effects are taken into account, an estimated total **323,000 jobs**¹² are supported, equating to around 237,000 full time job equivalents as some of these are seasonal or part time. The relative importance of these jobs varies across the region. Table 3.8.2 shows that Devon and Cornwall have the highest level of employment in the Tourism sector, across all sub-sectors. However, as a percentage of total employment, Tourism is more important to Somerset.

Table 3.8.2: Employment by LSC area and Tourism sub-sector

LSC Area	Hospitality	Travel Tourism and Events	Cultural Heritage	Sports and Recreation	Total Number of employees	Percentage of Tourism employment in South West	Percentage of total employment in sub-region
West of England	14,681	1,023	1,577	4,105	21,386	11%	4.1%
Wiltshire & Swindon	13,796	755	1,218	5,245	21,014	11%	6.6%
Devon & Cornwall	47,096	1,580	3,854	14,150	66,680	35%	9.4%
Somerset	18,151	771	1,392	5,746	26,060	14%	10.9%
Gloucestershire	17,543	1,221	2,121	4,609	25,494	14%	8.9%
Bournemouth, Dorset & Poole	17,959	1,083	1,867	6,432	27,341	15%	8.5%
Total	129,226	6,433	12,029	40,287	187,975	100	7.8%

Source: Nomis Annual Business Inquiry

On the basis of the four sub-sectors being examined:

- **Hospitality** – This sub-sector covers all providers of accommodation (except caravans), restaurants and pubs. 129,226 people are employed in this sub-sector in the region, accounting for 76% of overall employment in the sector. The NTO for this sub-sector is the **Hospitality Training Foundation (HtF)**;

⁷ *State of Tourism South West 2003 – Summary Draft –*, South West Tourism p.1

⁸ *Annual Business Inquiry Employee Analysis, 2001* www.nomisweb.co.uk (N.B. Only hotels and restaurants)

⁹ *State of Tourism South West 2003* p.2, *ibid*

¹⁰ Source: Tourism Sector Workforce Development Plan 2002 – 2003 – Tourism Skills Network South West p.1

¹¹ *Annual Business Inquiry Employee Analysis, 2001* www.nomisweb.co.uk

¹² *State of Tourism South West 2003* p.2, *ibid*

- **Sports and Leisure** – This sub-sector covers sports and fitness, playwork, the outdoors, leisure parks, piers and attractions and caravans. Approximately 40,287 people are employed in this sub-sector in the region. The NTO for this sub-sector is **SPIRITO**;
- **Cultural Heritage** – This sub-sector covers Nature Reserves, Parks, Gardens, Tourist Attractions, Visitor Centres, Archaeological and Historic Houses/Sites. Approximately 12,029 people are employed in this sub-sector in the South West. The NTO for this sub-sector is the **Cultural Heritage NTO (CHNTO)**; and
- **Travel Tourism and Events** – This sub-sector covers travel agents, tour operators and event organisers. Approximately 6,433 people are employed in this sub-sector in the South West. The NTO for this sub-sector was **Travel Tourism and Events NTO (TTENTO)** has now been incorporated into HtF).

Sector Skills Council Development

As discussed in chapter 2 of this report, the National Training Organisations are being replaced with Sector Skills Councils. For the Tourism sector, the following changes are taking place:

- The Hospitality Leisure and Tourism SSC is being formed which will cover¹³: Hotels, Restaurants, pubs and bars, hospitality services, contract catering, holiday parks (some aspects), caravan parks (some aspects), youth hostels, travel services, tourist services, events, gambling and betting, clubs, dance halls and discos, and visitor attractions.
- The SkillsactiveUK SSC is being formed which will cover¹⁴: Sport, recreation, children's play, health and fitness, outdoor education, training, caravans, recreation and adventure.

Both of these SSCs have had an Expression of Interest Accepted and are in the process of developing their full proposals.

- The Cultural Heritage sector is currently in the process of developing an expression of interest alongside other cultural and creative industries to form the Creative and Cultural Industries SSC.

Due to the diversity of these sub-sectors the following sections of this chapter detailing skills needs and NVQ provision are reported on by each sub-sector in turn.

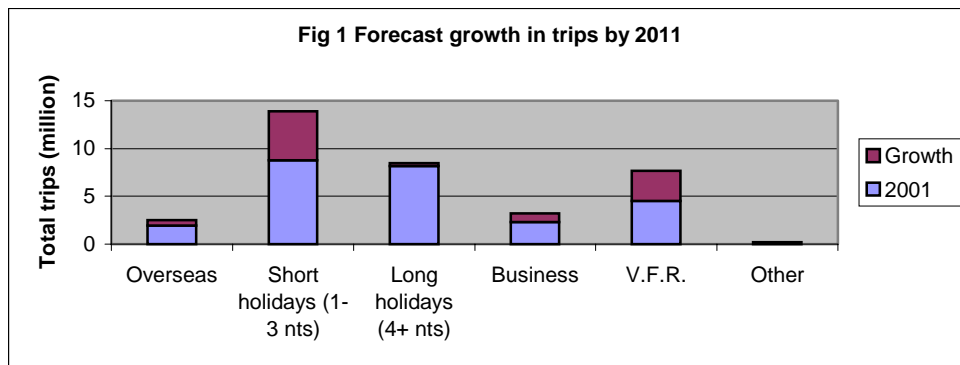
Growth of Tourism¹⁵

The State of Tourism South West report estimates that by 2011, the South West will receive 33.5m domestic trips (a growth of 39%) and 2.6m overseas trips (a growth of 32%). Figure 3.8.1 overleaf shows how this is expected to affect different markets. (These forecasts could be an underestimate. The figures assume static market share whereas in fact the South West's share of the UK market has been growing in the last 10 years and this may continue).

¹³ SSDA website – SSCs in development <http://www.ssda.org.uk> 30th June 2003

¹⁴ SSDA website – SSCs in development <http://www.ssda.org.uk> 30th June 2003

¹⁵ *State of Tourism South West 2003*, Ibid

Figure 3.8.1: Forecast Growth in trips by 2011.

Source: *State of Tourism South West*, Ibid

The report also estimates that growth in spending will be considerably less than in trips, owing to a tendency towards shorter trips in all types of market. Growth in spending, in real terms, by UK visitors to 2011 is forecast at 20% and by overseas visitors at 14%. Day trips in the South West are forecast to grow by 20% by 2011, with spending on them growing by 15%.

In terms of the structure of society and tastes that will influence tourism, the report states:

- Demographic changes, including an increase in 45+ and 15-24 age groups and a decline in the number of families with young children;
- An increase in the ABC1 socio-economic group, in personal income and standards of living and in the proportion of the population benefiting from higher education;
- A continuing interest in health and personal development, leading to more activity holidays; and
- Increasing congestion from traffic affecting holiday travel patterns and day-trip taking.

The leisure sector is also one of burgeoning growth with sports, outdoor recreation and activities and health and fitness clubs and practitioners leading to growth¹⁶.

However, with rising customer expectations and choice, the competitive edge in the sector increasingly rests on raising service standards. The UK is fast falling behind other international tourist destinations which are able to deliver 'World Class' standards of excellence¹⁷.

The main underlying competitive weakness in the sector lies in growing skills gaps and shortages which were highlighted in the Government's Tourism Strategy: *Tomorrow's Tourism – A Growth Industry for the New Millennium*. With many employers in the sector having enormous problems recruiting and retaining staff, productivity levels are around half of those in the USA, Germany and France. Fewer than 16% of managers and supervisors are appropriately qualified compared with over 50% in other sectors.

¹⁶ *Mapping the Supply and Demand for Skills and The Skills Information Gateway* p,54, Ibid

¹⁷ *An Assessment of Skills Needs in Tourism and Cultural Industries* July 2002 DFES p11

3.8.3 Review of Tourism and Skills Strategies relevant to the research

The following section reviews the various skills research and action plans that have been produced covering the Tourism sector. This includes those produced by the sector itself, the local LSCs and other existing sub-regional plans by local academics, etc. The section focuses on the actions identified in these plans for addressing the training and skills needs of the sector, highlighting the role NVQs are seen as playing in meeting these needs. This section does not include plans produced for the four sub-sectors as these are included in later sections of the chapter.

Tourism Strategies fall into one of three categories:

- South West Tourism Skills Research and projects;
- South West Tourism strategies; and
- LSC documents.

3.8.3.1 South West Tourism Skills Research and Projects and Action Plans

The Tourism Skills Network South West, formed in 2001, produced the *Tourism Sector Workforce Development Plan 2002-2003*. The plan was based on a postal survey of 12,700 tourism businesses, of which 952 completed the survey. The survey examined the following issues:

- General information on tourism businesses and their employees;
- The business and its training provision;
- Qualifications and skills gaps;
- Linkages to mainstream education; and
- Information about the support required from Tourism Skills Network South West.

The survey provides significant information relating to training provided by employers in the South West including:

- Vacancy levels are about 19%. Most vacancies are in the hospitality sector with visitor attractions and transport operators having the lowest number of vacancies;
- Staff turnover is 48% - compared to a UK average across all sectors of 17.6%;

Overall respondents reported a lack of applicants for vacancies. The five hardest to fill vacancies in the region are identified in Table 3.8.3:

Table 3.8.3 – Five hardest to fill vacancies in the South West

Vacancies	% of unfilled vacancies
Chefs	18%
Food and Beverage staff	15%
Housekeeping	12%
Night Staff	10%
Front of House	9%

- 59% of respondents said that they know of the industry-relevant courses provided in their area, although knowledge of local provision did not always equate to satisfaction, with 33% of respondents stating that what was being offered did not meet their needs;
- 85% of respondents said that they currently provide training either for their staff or for themselves, although it is thought that this response may be biased because only those companies interested in training would have been likely to have completed the questionnaire;

- 56% have no formal training plan and 63% have no training budget;
- The main training topics currently being delivered centre on statutory requirements – health and safety (including fire procedures) and food hygiene;
- The main methods of delivering training are through ‘in house’ provision (26%) and shadowing work colleagues (22%). This supports the assumption that training is mainly opportunistic and reactive rather than strategic and seen as a means to achieving better productivity. The use of local colleges and training providers are the main methods of delivering training through external sources;
- Only 5% of respondents used online learning as a training tool;
- Most respondents delivered training all year round, as well as when new staff joined. The peak times that businesses carry out training is in the winter months prior to Easter (February and March in particular) and in the Autumn (October- December); and
- Lack of time to train was given as the principle barrier to training by respondents; closely followed by cost and inability to release staff to attend training. Lack of local provision, relevant courses and finding information on training were also given as key barriers to accessing training. In Devon, Cornwall and Somerset poor local access was cited as the most important barrier to training (after costs).

Based on this research the Tourism sector workforce development plan is centred on the following themes:

- Employer Engagement;
- Careers/Image;
- Education;
- Skills Training;
- Recruitment/Retention;
- Quality;
- Voluntary Sector;
- Sustainability; and
- One Voice

The most relevant of these to this research is skills training with the survey identifying the following needs:

- Assistance in training and development of staff;
- Training for owner managers;
- Subsidised training programmes; and
- Information on training and development resources available.

Actions:

- Training needs analysis service for small/micro tourism businesses;
- Publication of information detailing all industry specific training provision in South West;
- Funding support for training;
- Development of training resources;
- Identifying gaps in training provision and developing appropriate solutions; and
- Creating specific language and cultural awareness training.

As can be seen from the excerpts above, provision of NVQ qualifications, or NVQ equivalents do not feature strongly in this plan.

The Tourism Sector Workforce Development Plan is supported in part by the **SWRDA Tourism Action Plan** which includes the following actions relevant to this research:

- Improving the provision of training and qualifications
- Identify current, quality, flexible courses/units that would be appropriate for tourism managers;
- Mapping of existing products and publication of brochure/website detailing training provision in the South West;
- Identify those occupations within the sector that do not currently have a qualification. Work with SSCs and awarding bodies to develop qualifications for those identified.
- Work with LSCs to ensure that courses available are of good quality and available when needed;
- The RDA, LSCs and providers work together to help facilitate/influence the development of a 'pick and mix' service. Here modules from different courses can be combined to fit an individual's businesses needs;
- More private sector involvement should be encouraged to assist in the training delivered by the FE sector ensuring that it is directly relevant to what the industry requires; and
- The LSC funding of FE should enable greater FE flexibility in line with private sector demands;

It is interesting to note from this list that NVQs have not been specifically mentioned.

3.8.3.2 South West Tourism Strategies

Towards 2020: A Tourism Strategy for the South West¹⁸, is the main strategy for the Tourism industry in the South West. The overall aim of the tourism strategy is to: *'Maximise the overall contribution of tourism to the wider economic, social and environmental well-being of the region'*. The strategy recognises the importance of skills development in the workforce with the following objectives proposed:

- Raise the level of professional and managerial expertise in tourism businesses;
- Encourage better conditions of work and of personal development for staff employed in the industry; and
- Overcome skill shortages and recruitment difficulties within the region.

With the following actions:

- Help businesses become more competitive by improving the management and professionalism of tourism businesses;
- Encourage the development of good employment practice in the tourism industry;
- Provide training opportunities geared to industry needs; and
- Tackle recruitment and image problems: forging links between individual tourism businesses and local schools and colleges would be helpful.

The actions proposed within this strategy are in-line with those proposed above and the issues identified on a sub-sector basis later in this chapter.

¹⁸ *Towards 2020: A Tourism Strategy for the South West* – West Country Tourist Board March 1999

3.8.3.3 LSC strategies in relation to Tourism

Devon and Cornwall

The LSC Devon and Cornwall's Annual Plan for 2003 does not identify specific sectoral issues or targets to be addressed. The 2002 needs analysis also does not address sector specific issues. The Draft Workforce Development Strategy to 2005 for Devon and Cornwall does mention the needs of the Tourism Sector as a growing sector:

- An acknowledgement of the fact that the tourism industry is growing, with the following statement:
 - *Many retailers, hotels and restaurants are small entrepreneurial or life style businesses. This can influence how these employers approach skills and training. Training provision needs to be appropriate to the time-scales, seasonality, part-time nature of employment and of then the personality of the owners.*
- Tourism and Leisure have also been included in a list of growing industries in which the LSC's strategy for training includes:
 - Heavy emphasis on training to meet industry needs; and
 - Train both those in the industry and potential newcomers.

Gloucestershire

The Gloucestershire LSC Business Plan/02/03, identifies Tourism and Hospitality as a key sector in the Gloucestershire Economy, and as such it has approved the development of a Tourism and Hospitality CoVE at the Royal Forest of Dean College.

West of England

Tourism is highlighted in the Annual Plan as a priority area for mainstream provision. It has set up an employer led tourism task force (see section A.4.5 for more detail).

Bournemouth and Poole

The LSC Bournemouth, Dorset and Poole has identified tourism as one of six priority areas in which it will be encouraging the establishment of specific programmes to enhance competitiveness and tackle the sector skills gaps and needs of employers and developing sector plans.

Somerset

The Somerset LSC recognises Leisure and Tourism as important components of the economy although they tend to be low margin businesses with low skills and pay.

Wiltshire and Swindon

Tourism is identified as a priority sector by the Wiltshire and Swindon LSC with focused skills sector development work planned.

The following sections examine the Skills Needs of each of the Tourism sub-sectors:

- Hospitality (3.8.4);
- Sports and Recreation (3.8.5);
- Cultural Heritage(3.8.6); and
- Travel, Tourism and Events (3.8.7).

3.8.4 Hospitality

3.8.4.1 Overview and future demand - Hospitality

The hospitality sub-sector is by far the largest sub-sector of the Tourism industry employing almost 130,000 people in the region. It is also the sector with the greatest problems related to staffing and skills. The sector is considered fragmented and weakly organised, it is made up of primarily of micro-businesses (90% of businesses employ less than 10 people)⁴, making workforce development even more challenging.

Recruitment and retention are major issues affecting the sub-sector that result in skills shortages. There are several reasons for this including:

- The apparent limits to career progression and overall skills shortage particularly in the technical/craft and managerial skills¹⁹;
- Workers in the hospitality sector continue to receive lower pay than their counterparts in other industries;
- The industry remains seasonal to a large extent, therefore exacerbating the staff turnover issue; and
- Due to the high levels of staff turnover many employers do not see training as worthwhile.

People employed in the sector tend to be young - nationally 40% of those employed in the industry were under 25²⁰ - and female (67%)⁴. Many of these young people are well qualified, but are working in the industry during vacations from university and are not expected to stay. In the hospitality sub-sector 9.8% of employees possess a degree or higher education qualification and a further 27% have 'A' Levels. At the opposite end of the spectrum 15% of the workforce have no educational qualifications²¹.

Over 58% of employers in the hospitality industry in England have employees that hold an NVQ qualification, making NVQs the most popular qualification across the industry. This is followed by Short courses (such as Health & Safety) 54%, A Levels (45%), HND/C (31%), Degree (29%) and Modern Apprenticeships (10%).²²

Although the NVQ and the Modern Apprenticeship scheme have proved popular, employers and learning providers are concerned about the high number of drop outs. In many respects, the reasons for this are symptomatic of training and development across the industry. Employees changing their place of work and a lack of time to undertake assessment are seen as the two main reasons for such a high drop-out⁹.

As stated earlier, the tourism industry is expected to grow over the next ten years. This growth is expected to varying degrees across the market segments, with no areas suffering from a decline. Therefore demand for skills and staff will be based on current shortages and skills gaps. The Hospitality Workforce Development Plan states that

'Forecasts for the next few years are for sustained growth – it is predicted that a further 170,000 jobs will be needed by the industry by 2005'²³

¹⁹ Workforce Development Plan – A Strategy for the Hospitality Industry – HfT

²⁰ Labour Market Review 2001 - HfT

²¹ An Assessment of Skills Needs in the Tourism and Cultural Industries – July 2002

²² A Review of staff training and development in the hospitality Industry – Nov 2002 (HfT)

²³ Workforce Development Plan – A strategy for the Hospitality Industry – HfT p.12

The Bostock report estimates that employment in Hospitality is forecast to rise by between 26,600 and 35,800 by 2010.²⁴ The report also forecasts growth in employment in particular occupations as detailed in graph 3.8.2 overleaf. However, although some of these occupations are forecast a high percentage growth, some have a particularly low base, such as hotel porters and housekeepers, therefore the growth in terms of actual jobs is relatively low. The top five occupations for forecast new jobs (left axis) are:

- Waiters and Waitressing;
- Bar Staff;
- Catering Assistants;
- Chefs and Cooks; and
- Kitchen Porters.

The pubs and contract catering sector is forecast to expand over the next decade resulting in a growth in the number of bar and waiting staff needed²⁵. However, the anticipated growth in the short break market could lead to higher visitor numbers in the North and East of the region, therefore increasing the demand for staff there. It is also anticipated that consumers will increasingly demand higher levels of customer service and quality, as competition from the rest of the UK and abroad intensifies and disposable income and leisure spending are expected to grow²⁶.

3.8.4.2 Skills Gaps - Hospitality

The following documents were reviewed for skills gaps within the hospitality workforce:

- Tourism Sector Workforce Development Plan 2002-2003, Tourism Skills Network South West;
- An Assessment of Skills Needs in Tourism and Cultural Industries – July 2002 – DFES; and
- Workforce Development Plan, A Strategy for the Hospitality Industry – HfT.

The literature identified four types of skills: a) Industry specific and vocational skills b) Generic Skills c) Competencies derived from attitudes d) Management related. Table 3.8.4 below identifies for each type of skill specific gap in the Hospitality sub-sector and in which document the skill has been identified as a skills gap.

Table 3.8.4 – Skills Gaps within the hospitality sub-sector

Industry Specific/vocational skills	Generic Skills	Competencies derived from attitude	Management
Food and Drink Service ¹	Literacy/Numeracy ³	Communication ^{2,3}	People Management ^{2,3}
Foreign Languages ¹	ICT ^{1,2}	Time Keeping ²	Commercial Skills ³
	Customer Service ^{1,2,3}	Personal Appearance ²	Business Acumen ³
	Team work ^{1,3}	General Attitude ²	Succession planning ³
	Disability Awareness ¹	Willingness to Learn ³	Resource Planning ³
	Sales ¹	Being Flexible/Adaptable ³	Marketing ³
	First Aid ¹	Initiative ³	Strategic Management ³
	Health and Safety ¹		Leadership ²
	Green Tourism ¹		Innovation ^{2,3}
	Food Hygiene ¹		ICT ³
	Product knowledge ¹		Appraisals ¹

²⁴ *Mapping Supply and Demand for Skills and 'the Skills Information Gateway'* 2002 p.54, Ibid

²⁵ *Workforce Development Plan – A strategy for the Hospitality Industry – HfT* 2001 p.28

²⁶ *Towards 2020: A Tourism Strategy for the South West* p. 9, Ibid

	Problem Solving ³		Interview/selection ¹
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1 = Tourism Sector Workforce Development Plan 2002-2003, Tourism Skills Network South West

2 = An Assessment of Skills Needs in Tourism and Cultural Industries – July 2002 – DFES

3 = Workforce Development Plan, A Strategy for the Hospitality Industry – HfT.

Graph 3.8.2 Forecast employment by occupational area

Source: Mapping Supply and Demand for Skills and 'The Skills Information Gateway'. Bostock Marketing Group 2002. p55.

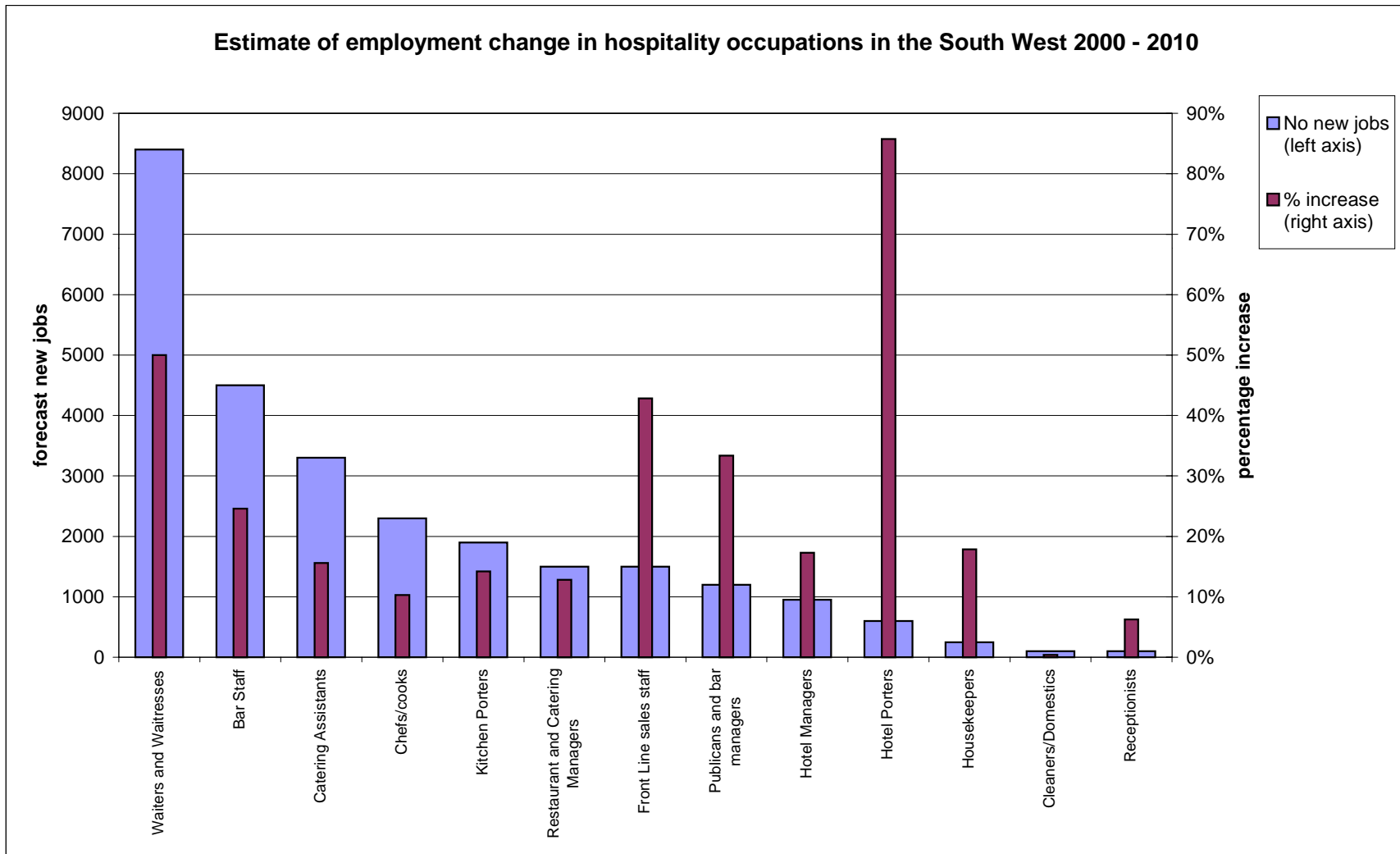


Table 3.8.4 showed that the skills gaps tend to be in generic, management and attitude areas, rather than in industry specific skills or vocational skills. The most frequently cited gap being 'Customer Service'. The skills dialogue discusses some of these issues in more detail, in particular²⁷:

- The lack of social skills such as communication, time-keeping, personal appearance and attitude amongst school leavers;
- The need for more transferable skills such as problem solving; and
- The need for more managerial skills.

The skills dialogue also discusses a number of unrecognised by the industry, but clearly evident skills gaps at managerial level such as²⁸:

- Lack of strategic management at the top;
- Weak Management skills at team leader level;
- Poor customer handling;
- Counter-productive leadership and people management;
- Resistance to innovation; and
- No awareness of how IT could be used to advance operations.

Issues surrounding the skills gaps - Hospitality

The HtF Workforce Development Plan identifies the following problems²⁹:

Demand Side

- A general lack of awareness of the need for training amongst employers, particularly SMEs, who do not train beyond induction³⁰. This relates particularly to ICT and management skills;
- The preference amongst employers for work based training offers opportunities for the workforce to develop quickly job related competencies. However, Government's insistence on external assessment of key skills and technical knowledge may have an adverse effect on the take-up of work based programmes and the subsequent achievements of national qualifications; and
- Employers often do not know how to access information on what learning provision is available and how this can be tailored by colleges and work-based providers to meet their needs.

Supply side

- Changing trends and external factors require industry personnel to have up to date technical knowledge and skills, however, this is not reflected in provision. Employers often report that colleges are not meeting their needs. This may be due to the content of NVQ programmes or it may be that current funding levels do not allow sufficient time to be spent developing practical skills;
- Hospitality training programmes are expensive to run and assess, several FE colleges have closed their catering departments as a result. Learning providers of all types should be able to access sufficient funding to cover all components of training frameworks;

²⁷ An Assessment of Skills Needs in Tourism and Cultural Industries, DFES 2002 p.43

²⁸ An Assessment of Skills Needs in Tourism and Cultural Industries, DFES 2002 p.43

²⁹ Workforce Development Plan – A Strategy for the Hospitality Industry 2001 P.31

³⁰ Look Who's training Now: HtF1999

- Historically, providers could not always access funding for short training courses/qualifications and mainstream provision, such as NVQs, are not always appropriate for small and micro businesses; and
- Employers report the need for providers to produce ‘work ready’ recruits at all levels. Yet not all young people have the capability to complete a level 2 NVQ programme within college or a Foundation Modern Apprenticeship and there is a need for a foundation level programme to introduce new entrants to the industry and provide them with employability skills.

3.8.4.3 Skills shortages - Hospitality

In terms of skills shortages, skilled chefs and managers were identified by the HtF as occupations with skills shortages³¹. The skills dialogue reports a wider range of recruitment problems with high vacancy levels in the following occupations: Chefs, waiting staff, bar staff, catering assistants and kitchen porters.

Labour Market turnover in the sub-sector is exceptionally high at 48%³². This is defined as the number of people leaving their job in a year as a percentage of the number of people employed in the industry. This is attributable to some extent to the nature of the industry, which makes relatively high labour turnover rates inevitable.

Seasonal business, labour intensive work and attractiveness to student and traveller or transient populations all serve to raise labour turnover levels. However, this does not give an indication of the extent to which people are leaving the industry, they may simply move from one hospitality employer to another.

A better indication of skills/labour shortages comes from analysis of the JobCentre Plus vacancies. There are two pieces of information that are useful with respect to this question, vacancies notified to job centres and unfilled vacancies i.e. those that were not filled during the previous three month period. The latest data is for July 2000 and is presented in table 3.8.5.

Table 3.8.5: Job Centre plus notified and unfilled vacancies for the South West July 2000

Occupation	Notified Vacancies ³³	Unfilled Vacancies ³⁴	Percentage Unfilled Vacancies
958 : Cleaners, domestics	5397	2892	54%
620 : Chefs, cooks	2681	1944	73%
622 : Bar staff	2395	1240	52%
621 : Waiters, waitresses	2198	1236	56%
952 : Kitchen porters, hands	1950	937	48%
953 : Counterhands, catering assistants	1330	805	61%
951 : Hotel porters	235	145	62%
174 : Restaurant/catering managers	220	134	61%
173 : Hotel/accommodation managers	94	51	54%
671 : Housekeepers (non-domestic)	86	49	57%
175 : Publicans, innkeepers/club stewards	58	36	62%
Total	16689	9486	57%

Source: Nomis – JobCentre Plus Vacancies

³¹ Workforce Development Plan – A Strategy for the Hospitality Industry 2001 p.21

³² Labour Market Review 2001 HtF p.44

³³ Vacancies notified to job centre plus in the three months prior to July 2000

³⁴ Unfilled vacancies in the three months prior to July 2000

In interpreting this data, it should be noted that approximately one third of the industries vacancies are advertised in Job Centres, many employers prefer to advertise through recruitment agencies, trade press, newspapers, window cards or word of mouth. It is also known that management vacancies are less likely to be advertised in Job centres than craft or operational vacancies³⁵. As an approximation for skills shortages this shows that nearly all occupations are experiencing difficulties recruiting staff, the worst being chefs and cooks with 73% of vacancies unfilled.

However, the extent to which this is a result of skills shortages rather than other factors such as low pay and working conditions is unclear. The high turnover rates suggest that retention is probably the biggest issue in the sector, especially for highly trained staff such as chefs and cooks.

Issues surrounding the Skills Shortages - Hospitality

The HtF workforce development plan identifies the issues surrounding the skills shortages under 2 main headings, recruitment and retention. Specific training related issues are listed here:

- Employers report a mismatch between the demand and supply of learning provision. The education system does not seem to be a major source of recruitment;
- Many part-time casual staff are less likely to remain in the industry and many employers are reluctant to train beyond the statutory requirement;
- The lack of training culture discourages people from staying, if people perceive little opportunity for skills development and career progression;
- Employers often do not link salary levels to attainment of qualifications; and
- Many people perceive the industry as offering work on a temporary basis, while they are travelling or studying. This cohort of people will always be present as they contribute towards seasonal business. However, opportunities are not fully exploited to influence them by formally recognising the skills they acquire, which would raise the status of hospitality skills within the workplace as a whole;

3.8.4.4 Current Training Levels and Issues - Hospitality

The South West Tourism Sector Workforce Development Plan identified that:

‘There is a significant lack of correlation between the skills identified in the survey of employers and their own training plans that focus on meeting short term statutory needs.’³⁶

This quote and the HtF issues identified above indicate that there is a serious issue in getting employers involved in training their staff. A national report provided the following insights into training and staff development in the hospitality industry³⁷:

- 75% of employers believed that qualifications were important when seeking a career in the hospitality industry;
- Most employers felt that they were a prerequisite when applying for a job as well as indicating a level of understanding about the industry;
- Over half of employers who didn't value qualifications believed that experience was more crucial;
- 58% of employers in England had staff holding NVQs;

³⁵ Labour Market Review 2001 HtF p.41

³⁶ Tourism Sector Workforce Development Plan – 2002-2003 South West Tourism Skills Network

³⁷ A Review of Staff Training and Development in the Hospitality Industry – HFT 2002 pp.35-40

- 36% of employers in England had staff working towards NVQs; and
- 35% of employers in England believed staff would work towards NVQs in the following year.

In addition to NVQs, learners also have many other options such as short vocational qualifications such as those offered by the British Institute of Innkeeping and the Hospitality Awarding Body. Learners also have the option of short customer service courses that do not necessarily lead to a nationally recognised qualification such as the English Tourism Councils Welcome to Excellence Programme launched in 1992, which consists of: Welcome Host, Welcome Management, Welcome All, Welcome International and Welcome Line - is the official qualification for the tourism industry. South West Tourism run these courses in the region and deliver training to approximately 2,500³⁸ people yearly.

3.8.4.5 Hospitality Workforce Development Plans

Under the HtF Workforce Development Plan strategy for action, several delivery issues relevant to this study were identified under its objective to 'Ensure Greater uptake of industry recognised qualifications' including:

- Providers must deliver a range of practical skills within NVQ and other vocational programmes, thus ensuring that trainees develop employability, are able to manage operations and a basis for developing higher level skills in the future;
- Work based and education providers should work collaboratively. This would ensure that the specialisms of different providers are utilised, e.g. to deliver programmes combining vocational, job-related knowledge, basic & key skills
- Funding should facilitate progression by enabling the attainment of units of qualifications to suit the pace of the learner and should also facilitate the development and monitoring of quality work placements, simulations, experimentation and research and development; and
- Funding agencies should channel funding into short course qualifications as these can alleviate local skills needs and help to engage many SMEs in learning. Some short course qualifications are useful to enable SMEs to capitalise on ICT for business building. The practical delivery of learning must be addressed, particularly for rural SMEs – the UFI's learndirect portfolio can help achieve this;

3.8.4.6 Accredited NVQ availability – Hospitality

Table 3.8.6 below lists the many NVQs specifically relevant to the Hospitality sub-sector. They have been based on those identified by:

- The sub-sector NTOs;
- The DfES qualifications and NVQs database;
- The Qualification Curriculum Authority's Framework of 738 accredited and available NVQs on May 19th 2003; and
- The LSC's central database of work-based learning provided for individual learners 2001-2002.

The table also shows each occupational group to which the NVQs apply, as defined by HtF.

³⁸ South West Tourism – Personal Communication

Table 3.8.6 Accredited NVQs relevant to the Hospitality Sector

Title	NVQ level	Hospitality occupational group
Food and Drink Service	1	3
Food Preparation and Cooking	1	4
Guest Service	1	3
Housekeeping	1	2
Kitchen Portering	1	4
Porter Service	1	1
Preparing and Serving Food	1	4
Reception	1	1
Food and Drink Service	2	3
Food Preparation and Cooking	2	4
Food Processing and Cooking	2	4
Hospitality Quick Service	2	3
Hospitality Service	2	3
Bar Service	2	3
Housekeeping	2	2
Reception	2	1
Residential Service	2	2
Hospitality Supervision	3	5
Food Service Advanced Craft	3	3
Drink Service Advanced Craft	3	3
Drinks Dispense Systems (Installation and Maintenance)	3	3
Food Preparation and Cooking (General)	3	4
Food Preparation and Cooking (Kitchen and Larder)	3	4
Food Preparation and Cooking (Patisserie and Confectionery)	3	4
Kitchen and Larder Specialist	4	4
Patisserie and Confectionery Specialist	4	4
NVQs not listed by HtF		
Cleaning and Support Services	1	2
Cleaning (Building Interiors)	2	2
Cleaning and Support Services	2	2
Cleaning: Within Food Premises	2	2
Customer Service	2	6
Accommodation Supervision	3	2
Customer Service	3	6
Front Office Supervision	3	1
Kitchen Supervision	3	4
Multi-Skilled Hospitality Supervision	3	5
On-Licensed Premises Supervision	3	3
Restaurant Supervision	3	3
Accommodation Management	4	2
Customer Service	4	6
Front Office Management	4	1
Kitchen Management	4	4
Multi-Skilled Hospitality Management	4	5
On-Licensed Premises Management	4	3
Restaurant Management	4	3

Note: Occupational Groups are: 1 = Reception, 2 = Housekeeping, 3 = Food and Drink Service, 4 = Food Preparation and Cooking, 5 = General Management and Supervision, 6 = Customer Service.

Table 3.8.6 above illustrates the available NVQ qualifications in the sub-sector. The table is split between those qualifications listed by the Hospitality Training Foundation and those found in the QCA database, which appear to be hospitality related. In totality the two lists complement each other very well, with the latter containing more management and supervision level qualifications.

The hospitality management level 4 NVQ was discontinued following consultation by the HtF that found that it was not required³⁹. This is inconsistent with the evidence presented under the sector skills needs that showed management level skills were needed in the sub-sector.

For interpretation purposes in the remainder of this section, the identified NVQs have been grouped by the four main sub-areas that make up the hospitality sub-sector⁴⁰:

- Reception;
- Housekeeping;
- Food and Drink Service; and
- Food Preparation and Cooking.

In addition, two further categories were added covering general management and customer service, as it was felt that some qualifications spanned more than one occupational group. On this basis, table 3.8.7 summarises the available progression opportunities by each of these six occupational groups.

Table 3.8.7: NVQ Progression opportunities by Hospitality occupational group

Hospitality area	NVQ availability
Reception	There is the possibility to progress from 1 to 4 by progressing from reception (1&2) to Front Office Supervision (3&4). There are no opportunities to progress from Level 1 Porter Service.
Housekeeping	There are progression opportunities from level 2 Residential Service or Housekeeping to Level 3 Accommodation Supervision and then on to Accommodation Management Level 4.
Food and Drink Service	There is good provision at levels 1-4, with opportunities to progress to On-licensed Premises management or Restaurant Management at Level 4.
Food Preparation and Cooking	There is good provision at levels 1-4, with opportunities to progress to Specialist or management roles at Levels 3 and 4.
General Management and Supervision	Opportunities to progress from Supervision to Management
Customer Service	Opportunities to progress from levels 2- 4

3.8.4.7 Worked Based NVQ Provision in the South West for Hospitality

Table 3.8.8 (parts 1 and 2) overleaf provides full details of the extent of work-based NVQ provision specific to the Tourism Sector in the region. It shows the number of learners;

- Undertaking work-based learning in the year up to June 2002;
- Registered on the NVQ/MA shown; and
- Resident in a postcode of the relevant South West LSC area or, if not resident in a South West postcode, registered with the LSC shown.

For analytical and interpretation purposes, the NVQs shown in tables 3.8.8 are then grouped by the six hospitality occupational areas as described previously and the analysis of the provision undertaken on this basis. This is presented in table 3.8.9 following parts 1 and 2 of table 3.8.8.

³⁹ Labour Market Review 2001, HtF p55

⁴⁰ HtF www.htf.org.uk – industry standards

Table 3.8.8: South West NVQ/MA Work-Based Provision in the Hospitality sub-sector - Number of learners 2001-02 (Part 1 – HtF listed NVQs)

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
Food and Drink Service	1	2	0	3	0	0	2	7
Food Preparation and Cooking	1	16	0	6	6	6	11	45
Housekeeping	1	8	0	0	6	2	1	17
Kitchen Portering	1	1	0	1	3	3	1	9
Porter Service	1	0	0	1	0	1	0	2
Preparing and Serving Food	1	1	0	2	0	5	0	8
Reception	1	0	0	1	3	0	0	4
Bar Service	2	10	6	1	3	1	13	34
Bar Service AMA	2	0	0	0	0	0	1	1
Bar Service FMA	2	91	56	38	52	109	38	384
Food and Drink Service	2	13	2	6	4	0	2	27
Food and Drink Service FMA	2	124	45	28	48	53	40	338
Food Preparation and Cooking	2	18	7	5	13	4	7	54
Food Preparation and Cooking AMA	2	0	0	3	0	0	0	3
Food Preparation and Cooking FMA	2	572	81	89	122	90	103	1057
Hospitality Quick Service	2	7	2	1	7	2	1	20
Hospitality Quick Service FMA	2	146	109	68	64	81	67	535
Hospitality Service	2	0	1	0	0	0	0	1
Hospitality Service FMA	2	122	26	26	8	2	11	195
Housekeeping	2	2	0	0	0	1	0	3
Housekeeping FMA	2	8	11	9	10	2	6	46
Reception	2	4	0	1	2	1	2	10
Reception FMA	2	36	11	35	32	14	14	142
Drink Service Advanced Craft AMA	3	0	0	1	0	0	0	1
Food Preparation and Cooking (General)	3	1	1	0	0	1	0	3
Food Preparation and Cooking (General) AMA	3	17	11	80	7	12	24	151
Food Preparation and Cooking (Kitchen and Larder)	3	5	2	0	4	4	4	19
Food Preparation and Cooking (Kitchen and Larder) AMA	3	111	18	85	26	36	28	304
Food Preparation and Cooking (Patisserie and Confectionery)	3	9	0	0	0	0	2	11
Food Preparation and Cooking (Patisserie and Confectionery) AMA	3	10	2	2	0	2	1	17
Kitchen and Larder Specialist	4	0	0	0	1	0	0	1
Total Part 1		1334	424	526	456	432	416	3449

Cont. opposite

Tables 3.3.8 (part 1) above and 3.3.8 (part 2) overleaf show that in total there were 7,555 work based learners within the hospitality sub-sector in the South West. 37% of these were from Devon and Cornwall, 18% in West of England, 12% in Bournemouth Dorset and Poole and Gloucestershire, and 10% in Somerset and West of England.

Among the 7,555 learners the three most commonly attended NVQs were;

- Food Preparation and Cooking FMA – level 2;
- Customer service FMA – level 2; and
- Customer service AMA – level 3.

Between them, these three NVQ accounted for 4,010 of the 7,555 total learners (53%). These 4,010 learners were even more concentrated within the Devon and Cornwall LSC area (45%) than the overall spread of provision reported above.

Table 3.8.8: South West NVQ/MA Work-Based provision in the Hospitality sub-sector: Number of learners 2001-02 (Part 2– non HtF listed NVQs)

	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
NVQs not identified by HtF NVQ framework								
Cleaning and Support Services	2	0	0	0	7	0	0	7
Customer Service AMA	2	0	2	1	0	1	0	4
Customer Service FMA	2	839	201	123	273	91	227	1754
Customer Service NVQ	2	48	6	2	156	8	6	226
(Multi-skilled) Hospitality Supervision	3	3	1	0	0	0	0	4
(Multi-skilled) Hospitality Supervision AMA	3	15	12	21	4	8	7	67
Accommodation Supervision	3	0	1	0	0	0	0	1
Accommodation Supervision AMA	3	5	1	10	2	0	2	20
Catering and Hospitality - Supervisory management	3	0	0	0	1	0	0	1
Customer Service AMA	3	395	75	103	336	140	150	1199
Customer Service FMA	3	0	0	1	0	0	0	1
Customer Service NVQ	3	24	0	2	45	1	8	80
Front Office Supervision	3	7	1	0	1	0	0	9
Front Office Supervision AMA	3	20	3	28	20	7	10	88
Kitchen Supervision	3	6	0	0	2	0	1	9
Kitchen Supervision AMA	3	10	13	13	11	12	9	68
Kitchen Supervision FMA	3	0	0	1	0	0	0	1
On-Licensed Premises Supervision	3	3	2	1	2	0	3	11
On-Licensed Premises Supervision AMA	3	44	39	54	42	51	65	295
Restaurant Supervision	3	12	0	1	3	2	5	23
Restaurant Supervision AMA	3	52	32	35	23	36	48	226
Kitchen Management	4	3	0	0	0	4	0	7
Multi-skilled hospitality management	4	2	0	0	0	1	0	3
Restaurant Management	4	1	0	1	0	0	0	2
Total Part 2		1489	389	397	928	362	541	4106
Totals	-	2823	780	889	1349	794	920	7555

Source: LSC Central Work-Based Learning (WBL) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

Tables 3.3.8 (part 1) and 3.3.8 (part 2) also show that, aside from the three main courses previously noted, learners were concentrated in a further 10 NVQs. These ten had a total of 2,796 learners undertaking them, or more than a third of the total of 7,555 (37%). The ten NVQs on which provision was also focused were;

- Bar service FMA – level 2;
- Food and drink service FMA – level 2;
- Hospitality service FMA – level 2;
- Reception FMA – level 2;
- Food preparation and cooking (General) FMA – level 2;
- Customer service – level 2;
- On-Licensed premises operation AMA – level 3; and
- Restaurant supervision AMA – level 3.

Thus NVQ provision in the hospitality sector is very much focused on thirteen NVQs in total – the ten above plus the three noted on the previous page. Between them, there were 6,806 learners on these thirteen NVQs – representing nine out of ten of all learners in the sector (90%).

All of these thirteen NVQs were at either levels 2 or 3, demonstrating the relative lack of progression opportunities in the sub-sector.

This finding is further illustrated by table 3.8.9 below which summarises progression opportunities across the sector in terms of the six occupational groups described earlier. It shows that opportunities for progression to levels 4 and 5 were virtually non-existent and that there was also very little provision at level 1. Thus nearly all provision was clustered in levels 2 or 3, providing little chance of long-term progression.

Table 3.8.9 Work-based NVQ progression opportunities by occupational group

Hospitality area	South West Provision
Reception	<ul style="list-style-type: none"> Poor provision at level 1 Good provision for level 2 and 3 through the MA route
Housekeeping	<ul style="list-style-type: none"> Poor provision at level 1, 0 in Devon and Cornwall and Somerset
Food and Drink Service	<ul style="list-style-type: none"> Poor provision at level 1 Level 2 good through the MA route Level 3 advanced craft – poor Level 3 Supervision good through MA route Level 4 – Poor throughout
Food Preparation and Cooking	<ul style="list-style-type: none"> Level 1 low, 0 in Somerset Level 2 good through MA route Level 3 – General – Good Level 3 – Kitchen and Larder Good Level 3 – Patisserie and Confectionary - low, 0 in West of England Level 3 – Supervision – Good Level 4 – Kitchen and Larder, 0 except Bournemouth, Dorset and Poole Level 4 – Kitchen Management, 0 except Devon and Cornwall and Wiltshire and Swindon
General Management and Supervision	<ul style="list-style-type: none"> Level 3 Hospitality Supervision good through MA route Level 4 – Multi-skilled Hospitality Management, 0 except Devon and Cornwall and Wiltshire and Swindon.
Customer Service	<ul style="list-style-type: none"> No gaps at levels 2 and 3, good through the MA route.

Table 3.8.10 below illustrates this clearly by showing the split between the Hospitality occupational groups described above and levels 1 to 5. It shows that the greatest provision is in the 'Customer Service', 'Food and Drink Service' and 'Food Preparation and Cooking' Sectors and at Level 2 and Level 3.

Table 3.8.10 Quantitative analysis of work-based learning provision by occupational group and NVQ Level

	Level 1	Level 2	Level 3	Level 4	Level 5	Total
Reception	6	152	97	0	0	255
Housekeeping	17	56	21	0	0	94
Food and Drink Service	7	1535	556	2	0	2100
Food Preparation and Cooking	62	1114	583	8	0	1767
General Management and Supervision	0	0	72	3	0	75
Customer Service	0	1984	1280	0		3264
Total	92	4841	2609	13	0	7555

3.8.4.8 FE/HE Provision of NVQs in the South West for Hospitality

Table 3.8.11 overleaf details the extent of NVQ provision in FE/HE colleges specific to the Hospitality Sector in the South West. It show the number of learners who were:

- Registered for the academic year 2001-2002;
- Registered on the NVQ/MA shown; and
- Registered with a FE/HE college situated in the South West.

Table 3.8.11: South West NVQ/MA FE/HE Hospitality provision: No. of learners 2001-02

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
Food and Drink Service	1	5	24	0	0	33	2	64
Food Preparation and Cooking	1	67	24	28	10	88	0	217
Guest Service	1	14	0	0	0	0	0	14
Housekeeping	1	43	0	0	0	3	0	46
Kitchen Portering	1	15	0	0	0	16	0	31
Preparing and Serving Food	1	0	8	12	0	36	10	66
Reception	1	23	0	0	0	0	0	23
Bar Service	2	0	1	0	0	65	0	66
Food and Drink Service	2	95	10	6	18	36	0	165
Food Preparation and Cooking	2	353	107	152	71	49	159	891
Hospitality Quick Service	2	0	0	0	0	6	0	6
Hospitality Service	2	0	2	0	0	0	0	2
Housekeeping	2	0	1	0	0	7	0	8
Reception	2	25	0	0	0	0	0	25
Residential Service	2	6	0	0	0	0	0	6
Food Preparation and Cooking (General)	3	37	5	51	0	0	0	93
Food Preparation and Cooking (Kitchen and Larder)	3	87	2	19	7	6	1	122
Food Preparation and Cooking (Patisserie and Confectionary)	3	32	1	1	0	8	0	42
Food Service Advanced Craft	3	2	0	0	0	0	0	2
NVQs not identified by Htf NVQ framework								
cleaning and Support Services	1	0	0	0	0	0	14	14
Customer Service	2	64	23	11	27	159	0	284
Customer Service	3	151	25	19	63	348	27	633
Kitchen Supervision	3	0	4	10	0	2	0	16
Multi-skilled Hospitality Supervision	3	0	4	2	0	2	0	8
Restaurant Supervision	3	1	1	0	0	1	0	3
Kitchen Management	4	0	1	0	0	1	0	2
Multi-skilled Hospitality Management	4	0	1	0	0	0	0	1
Restaurant Management	4	0	1	0	0	0	0	1
Total		1020	245	311	196	866	213	2851

Source: LSC Central Database (FE/HE Provision) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

Table 3.8.11 shows that there were a total of 2,851 learners in FE/HE colleges in 2001-02. Of these, one third were located in Devon and Cornwall (35%) and a further third in Wiltshire and Swindon (30%). Only relatively small numbers were present in each of the four other LLSC areas.

Two NVQs were again the most commonly provided – customer service (at levels 2 and 3) and food preparation and cooking (at level 2) – accounting for 2,025 of the 2851 FE/HE learners (71%).

For interpretation purposes, FE/HE provision has also been grouped according to occupational category as shown in table 3.8.12 overleaf. This illustrates that provision is focussed primarily at levels 2 and 3, although there are a higher proportion of learners at level 1 than among the work-based NVQs. There are also very limited numbers at level 4 and none at level 5. Thus progression opportunities are again relatively limited to the lower levels 1, 2 and 3.

Table 3.8.12: FE/HE NVQ progression opportunities by occupational groups.

Hospitality Area	South West Provision
Reception	Level 1&2, 0 except Devon and Cornwall, which shows a medium level of provision.
Housekeeping	Level 1 low, except Devon and Cornwall and Gloucestershire Level 2, low everywhere, 0 in Bournemouth Dorset and Poole, West of England and Gloucestershire.
Food and Drink Service	Level 1 good, except Bournemouth Dorset and Poole, West of England and Gloucestershire. Level 2 good, except Gloucestershire Level 3 low, 0 in Bournemouth Dorset and Poole, West of England and Gloucestershire. Level 4, 0 except Somerset
Food Preparation	Level 1 Good, Gloucestershire low. Kitchen portering low, Level 2, Good Level 3, good, West of England and Gloucestershire low, kitchen supervision low. Level 4, 0 except Somerset and Wiltshire and Swindon
General Management and Supervision	Levels 3 and 4, low provision, 0 Devon and Cornwall, West of England and Gloucestershire.
Customer Service	Level 2 and 3 good, 0 level 2 in Gloucestershire.

Table 3.8.13 below shows that provision through FE/HE is highest in Food Preparation and Cooking and Customer Care. There is a low level of provision under General Hospitality Supervision and Management and Reception. There is a high level of provision at Level 2 and 3, but little at Level 4.

Table 3.8.13: Quantitative Analysis of FE/HE provision by occupational group and NVQ level

	Level 1	Level 2	Level 3	Level 4	Level 5	Total
Reception	23	25	0	0	0	48
Housekeeping	60	14	0	0	0	74
Food and Drink Service	78	239	5	1	0	323
Food Preparation and Cooking	314	891	273	2	0	1480
General Hospitality Supervision and Management	0	0	8	1	0	9
Customer Care	0	284	633	0	0	917
Total	475	1453	919	4	0	2851

3.8.4.9 Gaps in Provision of NVQ Training

Based on the literature review, it is estimated that some 28,000 new entrants are required by 2010 (excluding replacement of people leaving the industry or retiring) for the Hospitality sub-sector. When this is combined with the level of unfilled vacancies (a proxy for replacement), it can be shown that the greatest demand for new entrants will be among six key occupational groups;

- Cleaners/Domestics
- Waiters and Waitresses
- Chefs/cooks
- Bar Staff
- Catering Assistants
- Kitchen Porters

Table 3.8.14 contains the details of this analysis.

Table 3.8.14: Demand for new entrants into hospitality

	New posts (per year) to meet demands in growth	Unfilled vacancies per year (based on July 2000) ⁴¹	Total demand for new entrants (per year)
Cleaners/Domestics	17	2892	2909
Waiters and Waitresses	1400	1236	2636
Chefs/cooks	383	1944	2327
Bar Staff	750	1240	1990
Catering Assistants	550	805	1355
Kitchen Porters	317	937	1254
Restaurant and Catering Managers	250	134	384
Front Line sales staff	250	None provided	250
Hotel Porters	100	145	245
Publicans and bar managers	200	36	236
Hotel Managers	158	51	209
Housekeepers	42	49	91
Receptionists	17	None provided	17
Total	4433	9469	13902

Other sources of literature identified skills shortages for chefs and managers and also problems recruiting waiting staff, bar staff, catering assistants and kitchen porters. In terms of skills gaps, the most frequently cited were generic, attitudinal and management skills. Industry specific skills gaps were food and drink service and customer service.

Utilising the information from HtF, QCA and DFES, a full listing of course types and levels of qualification was identified in section 3.8.5.6 above. In reviewing these, the following gaps are revealed:

- No provision at Level 5;
- No opportunities to progress from Level 1, Porter Service; and
- No Level 1 Customer Service.

Given that the vast majority of skills gaps identified were generic, attitudinal and management related, it is important to establish that completing an NVQ will address these skills deficiencies. Therefore the HtF qualifications directory was used to examine the mandatory and optional units that learners would undertake to gain the qualification. From this analysis the following gaps were identified:

- The management skills gaps reported are at the strategic level, implying a need for NVQ level 5 training;
- In terms of generic skills there are some obvious gaps including, ICT, literacy and numeracy and disability awareness; and
- The extent to which NVQs can influence attitude cannot be measured by reviewing course content.

The availability of management courses is an interesting problem. Despite the industry stating that there is a skills gap in the area, the HtF were forced to withdraw their Level 4 management qualification due to lack of interest. This suggests that other barriers to training at a higher level need to be addressed before further Level 4 qualifications are introduced.

⁴¹ Nomis – Job Centre Plus Vacancies July 2000

Table 3.8.15 opposite details the workbased and FE/HE combined provision in the South West, by LSC and NVQ Level. It is colour coded to show NVQ availability and provision more clearly.

The table clearly shows that NVQ provision and progression opportunities are highly variable across the South West. Some key points to note in reviewing the table are:

- No NVQs available at Level 5;
- Low provision in all LSCs at Level 4;
- Low provision of Reception Level 1 in all LSC areas except Devon and Cornwall;
- Low provision in the Housekeeping occupational area, in all LSCs except Devon and Cornwall;
- High provision of Food and Drink Service at Level 2, medium provision at Level 3, but low provision at Level 1;
- Medium to Good Provision of Food and Drink Preparation and Cooking at levels 1-3 across all LSC areas;
- Poor provision of Food and Drink Preparation and Cooking at Level 4 in all LSC areas;
- Provision of general management and supervision NVQs is very variable across the region, with medium provision at Level 3 in all areas except West of England, Swindon and Wiltshire and Gloucestershire; and
- Customer Service Provision is good across all LSC areas.

What are the implications of this provision with regard to needs identified?

Occupational groupings

The pattern of provision across the occupational groupings is broadly consistent with the needs identified, i.e. there is more provision in customer service, preparing food and drink and serving food and drink than in the other occupational groups. However, the overall level of provision is less than that needed if the estimated demand for new entrants in the sector is to be met. By occupational group, the provision does meet the anticipated demand, such as in the areas of food and drink service and food and drink preparation. However, in other areas such as management, the NVQ provision did not meet anticipated demand.

In terms of gaps in the availability of NVQs and the demands of the sector, the most significant gap is in relation to management level NVQs, where take-up/provision is very low in all LSC areas. There was also a significant gap between anticipated demand for cleaners and receptionist and the numbers studying for NVQs, however, the verification process revealed that:






- The industry does not perceive a need for NVQs in housekeeping and cleaning;
- Receptionists tend to prefer to do NVQs in wider subject areas.

Table 3.8.14: . NVQ provision in the South West, by LSC, NVQ Level and Hospitality Occupational Area

Occupational Area	Devon and Cornwall						Somerset						Bournemouth Dorset and Poole					
	L1	L2	L3	L4	L5	Total	L1	L2	L3	L4	L5	Total	L1	L2	L3	L4	L5	Total
Reception	23	65	27			115	0	11	4			15	2	36	28			66
Housekeeping	51	16	5	0		72	0	12	2	0		14	0	9	10	0		19
Food and Drink Service	21	608	114	1		744	24	260	74	1		359	3	174	92	1		270
Food Preparation and Cooking	100	943	325	3		1371	32	195	59	1		287	49	249	262	0		560
General	0	0	18	2		20	0	0	17	1		18	0	0	23	0		23
Customer Service	0	951	570	0		1521	0	232	100	0		332	0	137	125	0		262
Total	195	2583	1059	6		3843	56	710	256	3		1025	54	605	540	1		1200

Cont.

Occupational Area	West of England						Wiltshire and Swindon						Gloucestershire						Total by occupational area
	L1	L2	L3	L4	L5	Total	L1	L2	L3	L4	L5	Total	L1	L2	L3	L4	L5	Total	
Reception	3	34	21			58	1	15	7			23	0	16	10			26	303
Housekeeping	6	17	2	0		25	5	10	0	0		15	15	6	2	0		23	168
Food and Drink Service	0	204	70	0		274	33	355	90	0		478	4	173	121	0		298	2423
Food Preparation and Cooking	19	206	57	1		283	154	143	83	5		385	22	269	70	0		361	3247
General	0	0	5	0		5	0	0	10	1		11	0	0	7	0		7	84
Customer Service	0	456	444	0		900	0	259	489	0		748	0	233	185	0		418	4181
Total	28	917	599	1		1545	193	782	679	6		1660	41	697	395	0		1133	10406

 No NVQ available
 0 provision
 1-10 learners
 11 - 100 learners
 100+ learners

Geographically

Currently the highest level of provision is in Devon and Cornwall, which is consistent with the numbers employed in the sector. As a percentage of employment, provision varies between the LSC regions ranging from 5.6% in Somerset to 12% in Wiltshire and Swindon, as shown in table 3.8.15 below. However, this masks gaps in provision for LSC areas, as described above, such as:

- Devon and Cornwall – Low Housekeeping L3;
- Somerset – Very low reception;
- Bournemouth, Dorset and Poole – Low L1 reception, low housekeeping, low L1 food and drink service;
- West of England – Low L1 reception, low housekeeping, low L1 food and drink service, low general supervision and management;
- Swindon and Wiltshire – Low reception and housekeeping, low general supervision and management; and
- Gloucestershire – Low reception and housekeeping, low L1 food and drink service, low general supervision and management.

Table 3.8.16: NVQ Learners as a percentage of employment in the sector.

	Total NVQ Learners	Total Employed	Percentage of employees, learning.
Devon and Cornwall	3843	47,096	8.2%
Somerset	1025	18,151	5.6%
Bournemouth Dorset and Poole	1200	17,959	6.7%
West of England	1545	14,681	10.5%
Swindon and Wiltshire	1660	13,796	12.0%
Gloucestershire	1133	17,543	6.4%
	10406	129,226	8.1%

Based on this, it can be concluded that in order to meet the skills needs for the future there is a need to address:

- The take up of courses at Levels 3 and above;
- The take up of courses relating to management qualifications;
- The provision of further NVQs or other qualifications to address issues identified in the skills gaps, but not covered by current NVQs; and
- Retention of skilled and qualified staff within the industry.

3.8.5.10 Validation exercise with sectoral experts and stakeholders

The validation exercise involved consultations and interviews with a range of employers and stakeholders drawn from across the breadth of the South West Tourism industry. This exercise was designed as a “check” on the main findings of the research on which recommendations were based. Thus, the main findings were presented to key employers and stakeholders to test whether they were consistent with the employers and stakeholders own experiences.

Most companies spoken to were members of the South West Tourism Skills network local groups. Therefore they have an interest in staff development issues and will perhaps overall provide a slightly bias view. However, their interest meant that they were in a position to answer most of the questions.

Training of staff – Most respondents trained staff using both internal training methods and external courses. In particular courses like welcome host were very popular. The South West Tourism Skills Network has conducted in excess of 800 company training needs analysis and assisted many companies with the delivery of training. However, few of these companies have expressed a desire to enrol employees on NVQs. Generally companies have sought short training courses to equip employees with the necessary skills, rather than NVQs which are perceived to take a long time. They are perceived to be of greater benefit to the employee than the employer who is more interested in staff developing skills than getting the piece of paper to prove it.

Skills Issues – The following skills issues were identified by respondents:

- Supervisory – all occupational areas;
- A shortage of chefs, especially in Swindon and Wiltshire and Bristol;
- Attitudinal issues – common sense, work ethic, seeking responsibility;
- English speaking;
- Literacy and numeracy;
- Ability to talk to customers and be friendly and efficient;
- Skills shortages in all occupational areas in Bristol; and
- Knowledge of environmental issues, disability awareness and health and safety;

Some respondents stated that staff turnover was a major issue as it is very damaging and disruptive. Another respondent felt that the industry has too high expectations of school and college leavers in terms of their skills and too low expectations in terms of the businesses responsibility to train and develop staff.

Use of NVQs - Many of the companies consulted had staff working towards NVQs or have previously had staff working towards NVQs. Many of the consultees liked NVQs and saw a role for the qualification in their business. In particular they liked:

- The format;
- The absence of pressure through exams;
- The ability to do the qualification in the workplace;
- The portfolio idea;
- The use of units; and
- That they suits practical people.

They felt that it helped their business by:

- Creating awareness of other ways to do things;
- Helps to push people on;
- Helps to retain staff; and
- Gets a trainee manager asking about the business.

However, they disliked:

- The paperwork required of employers to register staff which includes providing information on matters where they are already inspected by other agencies;
- The wording of questions could be quite complicated at level 2;
- Concerns that not all assessors were vocationally qualified, they felt that it was important that ‘the assessors knew their stuff’;
- Problems selling NVQs to staff, especially at a higher levels, because it isn’t necessarily valued as a higher level qualification;

- Difficulties funding staff over the age of 25. This has implications for an industry that recruits people of all ages and all levels of experience;
- There was also a concern that colleges, due to the pressures of the funding system, were no longer providing quality training and were out of touch;
- NVQs need to become less boring and patronising; and
- A concern that the WBL approach may lack quality input and may in fact re-enforce bad practice.

In terms of the range of provision, respondents were generally satisfied with the range of NVQs available nationally with the following suggestions:

- Ability to pick and mix units and personalise NVQs; and
- NVQ content should include more wide issues such as environmental, disability awareness and farm to fork.

In terms of the up-take of courses in the South West there was generally satisfaction with the numbers doing NVQs, although there was some scepticism that the numbers presented would not reflect completion. Food preparation and cooking was considered low in the West of England, given the crisis in recruiting qualified chefs. The following reasons were given for some of the areas of low uptake:

- At higher levels, people prefer to do an exam for its speed and convenience;
- At higher levels, people prefer to do professional qualifications as this gives them membership of professional bodies with greater recognition within industry;
- The lack of funding for over 25's is a barrier to higher level take-up, as many of the people working at supervisory or management level are over 25;
- People prefer general courses such as customer service, rather than reception or housekeeping as this gives them broader experience and meets aspirations;
- There is no need for a housekeeping NVQ as each establishment has their own standards which will be taught to new staff in house;
- It is difficult to encourage people to do a higher level qualification as NVQs are not recognised by employees as a nationally recognised qualification of value;
- There is a perception that supervisors and duty managers may consider an NVQ, but general managers would not consider doing it; and
- There is low uptake at Level 1 because it is so basic.

There were also some recommendations regarding increasing both the quantity and quality of NVQ provision including:

- Provide a central database of available training and funding for training for people in the industry to use to select appropriate training;
- Stream-line the application process, cutting out all the information that is assessed by other government agencies;
- The agencies concerned need to look at the targets which are based primarily on outputs (i.e. number of students) and instead look at quality of provision and relevance. Monitoring inputs not just outcomes;
- The LSC's need to get away from funding colleges and consider funding training delivered by industry; and
- Work placements for college lecturers;

3.5.8.11 Recommendations for NVQ provision/progression within Hospitality

The following section has two parts: firstly, the detail of recommendations addressing the issues identified by the study; and secondly the “fit” of these recommendations with the strategic documents reviewed earlier in the chapter.

Detail of recommendations

The mapping and research work, combined with the validation exercise, identified a series of recommendations to help improve NVQ provision and progression for the Hospitality sub-sector in the South West;

Paperwork

- Reduce the extent of paperwork for employers to register employees on NVQs;
- Reduce the amount of paperwork involved in completing the NVQ itself;

Marketing/Branding

- Consider ways of targeting marketing towards those looking to higher NVQs;

Improve quality of training/assessment

- Within FE/HE provision ensure relevance and quality not just quantity;
- Tighten up delivery of work-based NVQs to ensure the input is not reinforcing bad practice; and
- Build up a network of qualified assessors.

Funding

- Introduce and market the availability of funding for people over 25 to do NVQs;
- Consider funding industry run training as an alternative to FE/HE provision; and
- Provide a reliable source of information concerning the provision of courses and available funding.

The NVQ itself

- Consider a different format for higher levels to make achievement less time consuming, consider introducing a voluntary exam component;
- Consider methods of delivery that are less boring and patronising;
- A unitised approach to allow businesses and individuals to personalise the NVQ to make it more relevant; and
- Introduce modules on wider issues.

The “fit” of these recommendations with the strategic documents reviewed earlier in the chapter.

The following recommendations have a fit with the strategic documents reviewed earlier in the chapter:

Improve quality of training/assessment

- Within college based provision take steps to ensure relevance and quality not just quantity. *This fits with the South West Tourism Skills Network aim to work closely with schools, colleges and universities providing industry related courses to ensure that curriculum content more closely reflects the needs of industry;*

Funding

- Introduce and market the availability of funding for people over 25 to do NVQs. *This fits loosely with the South West Tourism Skills Network aim to source and develop industry specific training that is cost effective, relevant and accessible.*
- Provide a reliable source of information concerning the provision of courses and available funding. *This fits with the South West Tourism Skills Network action to 'Publication of information detailing all industry specific training provision in South West'.*

The NVQ itself

- A unitised approach to allow businesses and individuals to personalise the NVQ to make it more relevant; *This fits with the SWRDA Tourism Action plan 'The RDA, LSCs and providers work together to help facilitate/influence the development of a pick and mix service. Here modules from different courses can be combined to fit an individual businesses needs'.*

3.8.5 Sports and Recreation sub-sector

3.8.5.1 Overview – Sports and Recreation

The sports and leisure sub-sector is very diverse – employment ranges from sports coaches, fitness instructors, mechanical ride operators, playworkers, outdoor leisure pursuits and education. Therefore, there are a multitude of issues that affect people employed in this sector which are specific to their occupation, rather than generic issues.

The Sports and Leisure sub-sector is made up of the following six areas:

- Sports and Recreation (e.g. sports and leisure facilities, stadia and arenas);
- Exercise and Fitness (e.g. single club operators, multi-club operators);
- Playwork (e.g. open access settings, play development, mobile provision);
- The outdoors (e.g. education, development and recreation, sport);
- Leisure attractions (e.g. leisure parks, piers and attractions); and
- Caravan Industry (e.g. caravan parks).

The extent to which these sub-sectors can be defined as part of the tourism and leisure sector is variable, examination of the occupations under playwork reveals that this sub-sector has more in common with childcare and social services than tourism and leisure, therefore it has been excluded from any further analysis.

Table 3.8.17 overleaf shows that employment in the sector is dominated by the sports and recreation sub-sectors. It also indicates that there are large numbers of voluntary workers in the sector with a bias towards part-time and female employment⁴². SPIRITO has not produced a workforce development plan for the whole of its remit, instead it has produced a workforce development plan for each of the sub-sectors, except Caravans. Therefore the skills issues, and review of the workforce development plan will be reported below according to each sub-area.

⁴² SPIRITO Workforce Development Plan – Final Draft as of 19/05/2003 – SPIRITO p.16

Table 3.8.17 : Estimates for employment within the SPIRITO sector.

	National estimates (2000) ⁴³		South West	Estimates
	Paid	Unpaid	From Bostock ⁴⁴	From NOMIS ⁴⁵
Sports and Recreation	400,000	1,750,000	34,000	24,263
Exercise and Fitness	50,000			(codes 9261, 9262, 9304, 9272)
The outdoors	50,000	30,000	4,200	5,977 (codes 9233, 9234, 9271)
Leisure attractions	7,000		2,100	10,047 (codes 5522, 5523)
Caravan Industry	60,000			40,287
Total	567,000	1,930,000	40,300	

3.8.5.2 Skills Issues and review of Workforce Development Plans

In order to get a full understanding of the skills gaps and issues affecting each of the sub-areas of this diverse industry, the workforce development plan for each area is discussed separately below:

Sports and Recreation⁴⁶

The occupational coverage for this sector includes:

- Coaches, teachers and instructors, coach tutors and mentors at all levels;
- Sport development facilitators and managers;
- Facility Operators and Managers;
- Sports Administrators;
- Professional Sports People; and
- Grounds men, sports psychologists, facility designers and builders.

With regard to skills:

- Skills requirements are deepening and broadening;
- Technical skills are changing due to new technology and products;
- Softer interpersonal skills are increasingly important; and
- Customer service and marketing skills are growing.

The most important skills were identified as:

- Communication;
- Maintenance of Safety;
- Team Working;
- Customer Service; and
- Willingness to learn, were also highlighted as having significant importance.

The most significant skills gaps were in teaching staff, operational staff and managers.

⁴³ SPIRITO workforce Development Plan – Final Draft as of 19/05/2003 - SPIRITO

⁴⁴ *Mapping Supply and Demand for Skills and The Skills Information Gateway*, p.57 Ibid – Based on partitioning national estimates from the NTO data.

⁴⁵ *Annual Business Inquiry Employee Analysis, 2001* www.nomisweb.co.uk (SIC codes 9261, 9262, 9304, 9272, 9233, 5522, 5523, as defined in SPIRITO sector workforce development plan).

⁴⁶ The following four sections (Sports and Recreation, Outdoors, Attractions and Exercise/Fitness) are all drawn from the relevant WDPs: *Sport and Recreation Workforce Development Plan 2001*, SPIRITO, *Outdoor Workforce Development Plan: 2001-2005*, SPIRITO, *Workforce Development Plan for the Attractions Sector*, SPIRITO or *Workforce Development Plan for the Exercise and Fitness Sector*, SPIRITO 2001

In terms of barriers to training, poor quality or lack of training opportunity was rarely cited as a problem, indicating the training providers are making opportunities available. However, particular difficulties continue to be experienced by employers understanding the role and value of VQs. Employers stated that they are too lengthy and expensive and want faster outcomes. This supports anecdotal evidence that stakeholders report continuing 'lip-service' to staff development and career patterns. There is also a perceived mismatch between the VQ Level 3 and abilities of those taking the qualifications.

The workforce development plan had 13 priorities for action of which 7 were directly relevant to this study:

1. Improve training and development programmes for volunteers;
2. Increase the commitment of employers to training and development;
3. Improve Employer commitment to VQs;
4. Support to HE and FE;
5. Encourage the specification of qualifications at recruitment;
6. Flexible qualification process taking into account the changing face of leisure;
and
7. A simplified qualifications structure;

Outdoors

There are essentially 3 types of worker in the outdoor sector:

- Long term, highly skilled and usually highly qualified employees;
- Short term and seasonal employees that fulfil specific tasks; and
- Volunteers who usually work for a few hours a week over a long period of time.

The outdoor sectors future is bright, with forecasts of increasing client base, gross sales and demand for services. A more multi-skilled workforce is required in this sector which should comprise specialist pastoral and people skills, together with technical skills and experience. These will meet increasing demand and fill gaps created by an unusually transitional workforce. Skills requirements are diverse, but include both people skills and technical skills varying from Level 1 to Level 4 depending on product/service requirements. Marketing and customer care are considered increasingly important and are not currently catered for. Training needs to include working with children and other vulnerable groups.

The National Governing Body Awards have been the standard technical skills award for many years. They continue to be important for much, but by no means all, work in the outdoors. There is demand for additional training/further awards that are more appropriate to lower and site-specific levels, although this appears to be covered currently by in-house training. Although employers are not legally obliged to employ staff with these awards, the statutory inspection scheme set up under the Activity Centres (Young Person's Safety) Act 1995, which applies to 30% of the Outdoor Sector, depends heavily upon NGB awards. On the job experience during training is very important to employment across the Outdoor Sector.

National Occupational Standards (NOS) for the outdoor sector were created in 1990 and have been applied to accredited training and NVQs. The sector is slow to adopt NVQs because of the excess of bureaucracy associated with them. They are considered too academic for many staff who are more practical in outlook. A review

and re-launch may be the only way to make these qualifications credible with the outdoor sector. Since the launch of the Outdoor NOS, accredited awards have been developed. They have helped employers overcome bureaucracy and non-unit based funding constraints of NVQs.

The Outdoor Workforce Development Plan identifies the need for a credible qualifications system in addition to the National Governing Body Awards. However, it states that if this is going to be NVQ, then they need re-designing and re-promoting to meet the needs of the outdoor sector. Part of this should include a review and removal of the amount of bureaucracy. This system could be a modular system that allows for technical and other skills development and be funded on a unit basis, in order to suit non-permanent employees, particularly in the voluntary and seasonal sectors.

Attractions

The attractions sub-sector includes employers such as: Theme Parks, Family Parks, Zoos, Safari Parks, Piers, Amusement Parks and Amusement Centres and Family Entertainment Resorts. Key positions include: Ride operators and engineers, technicians, ticket office staff, group organisers, food and beverage staff, maintenance, wardens, vets, guides, marketing, corporate hospitality etc.

The sector is becoming increasingly competitive and there is a perception that:

- Private sector attractions are competing with public funded ventures;
- There is currently an over-supply of attractions;
- The population's disposable income is on the increase but leisure time taken would appear to be decreasing;

The sectors workforce is not highly qualified with over one third of employees without any qualifications of any sort. The sector has high levels of seasonal and temporary staff due to the seasonality of the industry. Staff turnover is a problem from season to season and within seasons.

Training

- Most training that does occur tends to be delivered in house by existing staff;
- Permanent staff are more likely to be sent on external courses such as IT or Technical Operations courses (79% of employers);
- Only 36% of employers send seasonal staff on external courses with cost being the major obstacle to sending more seasonal staff on training courses;
- Health and Safety training is considered very important and is statutory for some staff. It is felt that legislation increasingly dictates the training that staff undergo, particularly with regard to operations and catering (i.e. Health and Safety/COSHH/Food Hygiene); and
- Some attractions run outside courses such as Welcome Host and Best Start, designed to enhance customer service and complaint handling as well as improving work practices.

While there are problems in recruiting full-time staff, peripheral staff are also becoming increasingly difficult to hire, as would be seasonal workers are being attracted to other sectors that can provide year round employment. Problems are being experienced in terms of recruitment in the Food and Beverage category due to a lack of applicants. In addition, many respondents reported difficulties recruiting suitably qualified managers.

Illiteracy is a problem among staff and therefore there is a reluctance to be trained, as most courses involve a classroom type method of training. Different methods of training need to be looked into in order that courses accommodate all staff. Employers complain that new staff arriving from higher education lack inter-personal skill such as communication and customer service. It is suggested that the present courses available to those wishing to work in the tourism and leisure sector are not hands on enough, and are leaving graduates with practical skills gaps.

Key skills gaps were:

- Customer Care;
- Health and Safety;
- Catering; and
- Information Technology.

Management skills gaps were also identified and employers agreed that a basic attractions management training package was lacking.

NVQs and vocational qualifications were not specifically mentioned as a priority for action in this Workforce Development Plan, probably because Vocational Qualifications were not meeting the needs of employers. The focus of the WDP was more on short-term training courses to meet immediate needs.

Exercise and Fitness

The exercise and fitness sector covers four different types of fitness club: independent, multiple groups, hotel based and clubs available in workplaces or residential complexes. In addition there are a significant number of leisure centres which also provide a fitness facility, as well as fitness centres owned and operated under charitable status. The sector has grown by 13-17% over the past five years in terms of revenue and further expansion is expected. SPIRITO estimates that the workforce is expected to double over the next 5-6 years. Coupled with this growth are rising customer expectations as press and media coverage ensure that the customer is well informed.

The qualifications of the workforce were significantly below average national levels in 1999, but it is believed that this may be masked by the high numbers of workers who are employed as support staff, and the relatively high number of people who have an 'industry' based qualification. The workforce development plan also identifies that insufficient training is given to employees for them to undertake their responsibilities at a competent level and that there is a very high level of staff turnover (70% at larger sites).

At FE level, provision is through GNVQs and Advanced NVQs in Leisure and Tourism, which partly cover the fitness industry, however, this is poorly regarded by employers due to its applicability. At HE level, Sports Science degrees are available, although there are still problems with graduates preparedness for the workplace. The NTO is developing a Graduate Apprenticeship Framework to address this. Private trainers have seized the initiative and supply the industry with the largest number of qualifications. However, there is no validation or accreditation process.

The most significant development in terms of training and assessment is the re-establishment of a fitness register, whereby all instructors and coaches will have to be able to demonstrate their competencies and be registered. The range of Level 2 NVQs are widely used, although the Level 3 is regarded as being too difficult and not

entirely appropriate – especially for those employees who entered the industry for vocational reasons rather than starting from an academic qualifications base.

In terms of skills, employers have stated that skills requirements are both broadening and deepening to match with the increasingly sophisticated development of its products and services and that the workforce needs to be multi-skilled, but also have strong, proven competencies.

Skills gaps in this sub-area included (in order of importance):

- Specific technical (e.g. instructors);
- Customer Service;
- Basic IT;
- Communication;
- Initiative;
- Management;
- People Management;
- Willingness to Learn;
- Leadership;
- Use of technical equipment;
- Team-working;
- Planning; and
- Other.

The most pressing skills gap exists at the management level, with over 40% of operators reporting management skills gaps.

Under priorities for action, this sub-area workforce development plan covers the following issues relevant to this study:

- Bringing FE/HE providers and employers closer together;
- Short courses to test competency;
- Greater use of Government schemes, such as modern apprenticeships;
- Validation of private provider courses and greater use of NOS;

NVQs do not feature highly under this plan, but this is probably because this sub-sector still has so much to do in terms of developing National Occupational Standards and career pathways.

Caravans – SPIRITO has not produced a workforce development plan for this sub-area.

3.8.5.3 NVQs specifically relevant to Sports and Recreation

Table 3.8.18 below lists the seventeen NVQs specifically relevant to the Sports and Recreation sub-sector. They have been based on those identified by:

- The sub-sector NTOs;
- The DfES qualifications and NVQs database;
- The Qualification Curriculum Authority's Framework of 738 accredited and available NVQs on May 19th 2003; and
- The LSC's central database of work-based learning provided for individual learners 2001-2002.

Table 3.8.18 Accredited NVQs relevant to the Sports and Recreation

Title	NVQ level
Sport, Recreation and Allied Occupations	1
C&G Level 2 NVQ in Instructing Exercise and Fitness	2
Maintaining and Operating Caravan Parks	2
Mechanical Ride Operations (Leisure Parks, Piers and Attractions)	2
Sport and Recreation (Sport and Play Installations)	2
Sport, Recreation and Allied Occupations - Activity Leadership	2
Sport, Recreation and Allied Occupations - Coaching, Teaching and Instructing	2
Sport, Recreation and Allied Occupations - Operational Services	2
Sport, Recreation and Allied Occupations: Spectator Control	2
Outdoor Education, Development Training, Recreation	3
Sport, Recreation and Allied Occupations: Coaching, Teaching and Instructing	3
Sport, Recreation and Allied Occupations: Operations and Development	3
Sport, Recreation and Allied Occupations: Spectator Control	3
Spectator Control	4
Spectator Safety Management	4
Sport and Recreation (Coaching)	4
Sport, Recreation and Allied Occupations: Operations and Development	4

Table 3.8.18 shows that there are no qualifications at level 5 and those available at Level 4 are limited to spectator safety management, operations development and coaching. A comparison with the occupational map of the sector⁴⁷ shows several gaps in NVQ provision including:

- No provision under 'Sports Administration';
- No provision under youth work and field studies (Outdoors);
- No provision for technicians, group organisers or performers (Leisure parks);
- No Level 3 Exercise and Fitness;
- No progression opportunities within the outdoor sector; and
- No NVQs for the attractions sector apart from mechanical rides, although some hospitality NVQs are likely to be appropriate for some occupations.

3.8.5.4 Work-based provision of NVQs in the South West for Sports and Recreation

Table 3.8.19 below details the extent of work-based NVQ provision specific to the Sports and Recreation sub-sector in the South West. It shows the number of learners;

- Undertaking work-based learning in the year up to June 2002;
- Registered on the NVQ/MA shown; and
- Resident in a postcode of the relevant South West LSC area or, if not resident in a South West postcode, registered with the South West LSC shown.

⁴⁷ Workforce Development Plan – SPIRITO Final Draft as of 19/0/03, Appendix 2

Table 3.8.19: South West NVQ/MA work-based provision in the Sports and Recreation sub-area: Number of learners 2001-02

Title	NVQ / FMA / AMA	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
Sport, Recreation and Allied Occupations	NVQ	1	2	0	1	0	1	0	4
Sport and Recreation (Facilities Operations)	FMA	2	0	0	0	2	0	0	2
Sport, Recreation and Allied Occupations: Activity Leadership	NVQ	2	53	0	0	4	0	0	57
Sport, Recreation and Allied Occupations: Coaching, Teaching, Instructing	NVQ	2	1	0	0	0	19	0	20
Sport, Recreation and Allied Occupations: Coaching, Teaching, Instructing	FMA	2	4	0	8	1	2	0	15
Sport, Recreation and Allied Occupations: Operations and Development	NVQ	2	4	0	0	0	0	0	4
Sport, Recreation and Allied Occupations: Operations and Development	AMA	2	0	0	1	0	0	0	1
Sport, Recreation and Allied Occupations: Operations and Development	FMA	2	92	13	120	13	18	1	257
Outdoor Education, Development Training, Recreation	NVQ	3	15	0	5	0	0	0	20
Sport and Recreation (Coaching Adults)	AMA	3	0	0	0	0	0	1	1
Sport and Recreation (Supervision)	NVQ	3	0	0	0	1	0	0	1
Sport and Recreation (Supervision)	AMA	3	0	0	0	1	0	0	1
Sport, Recreation and Allied Occupations: Coaching, Teaching and Instructing	AMA	3	2	3	5	0	0	0	10
Sport, Recreation and Allied Occupations: Operations and Development	NVQ	3	0	0	1	0	0	0	1
Sport, Recreation and Allied Occupations: Operations and Development	AMA	3	57	39	125	1	8	2	232
Totals		-	230	55	266	23	48	4	626

Source: LSC Central Work-Based Learning (WBL) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

Overall table 3.8.19 shows that there were over 600 work-based learners on NVQs in 2001-02. Nearly all of these were located in either Bournemouth, Dorset & Poole (42%) or in Devon and Cornwall (37%). The table also reveals some interesting patterns of provision, in terms of location and progression opportunities:

- Only four learners were registered on an NVQ Level 1 course;
- There were no learners registering for NVQ Level 2, exercise and fitness, therefore no work-based provision for this sub-sector;
- There were no learners registering for NVQ level 2, 'Maintaining and Operating Caravan Parks';
- There were no learners registering for NVQ Level 2, 'Mechanical ride operations', therefore there is no work-based provision for the operational side of attractions;
- Activity Leadership Level 2 provision is high in Devon and Cornwall, but low elsewhere;
- There was no NVQ/FMA Level 2 provision in 'coaching, teaching and instructing' in Somerset or Gloucestershire;
- There was a reasonable coverage across all LSC areas for NVQ Level 2 'Operations and Development' and there was a high take-up of the FMA in this subject;
- There were no learners registered on NVQ Level 2 or 3 'spectator control';
- The NVQ Level 3, 'outdoor...' had take-up only in Devon and Cornwall and Bournemouth Dorset and Poole;
- There was low take-up of two qualifications 'coaching adults' and 'supervision'

- There was a low level of take-up of Level 3 coaching NVQs;
- Level 3, operations and development had a high level of take-up, especially through the AMA route; and
- There was no take-up of NVQ Level 4 qualifications.

3.8.5.5 FE/HE provision of NVQs in the South West for Sport and Recreation

Table 3.8.20 below contains details of the extent of NVQ provision through FE and HE colleges specific to the Sports and Recreation sub-sector in the South West. It shows the number of learners who were:

- Registered for the academic year 2001-2002;
- Registered on the NVQ/MA shown; and
- Registered with a FE/HE college situated in the South West.

Table 3.8.20: South West NVQ/MA FE/HE provision in the Sports and Recreation sub-sector: Number of learners 2001-02

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
Sport, Recreation and Allied Occupations	1	13	0	0	8	5	0	26
Sport, Recreation and Allied Occupations: Activity Leadership	2	133	37	15	0	0	80	265
Sport, Recreation and Allied Occupations: Coaching, Teaching, Instructing FMA	2	0	31	0	3	52	59	145
Sport, Recreation and Allied Occupations: Operations and Development AMA	2	1	0	8	8	0	19	36
Outdoor Education, Development Training, Recreation	3	0	0	2	0	0	0	2
Sport, Recreation and Allied Occupations: Coaching, Teaching and Instructing AMA	3	0	0	0	21	0	0	21
Sport, Recreation and Allied Occupations: Operations and Development	3	0	0	6	0	0	0	6
Totals	-	147	68	31	40	57	158	501

Source: LSC Central Database (FE/HE Provision) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

Table 3.8.20 shows over 500 FE/HE learners were on NVQs relevant to Sport and Leisure. The majority of these were at level 2 and were located in Devon and Cornwall or Gloucestershire. Two NVQs (Sport, Recreation and Allied Occupations: Activity Leadership and Sport, Recreation and Allied Occupations: Coaching, Teaching, Instructing FMA) accounted for over eight out of ten of the learners.

In detail the table shows:

- FEHE provision in only 7 NVQ titles – NVQ Level 1 ‘Sport, Recreation and Allied Occupations, NVQ Level 2, Activity Leadership, NVQ Level 2 and 3 ‘coaching teaching and instructing ‘NVQ Level 2 and 3, ‘ Operations and Development and NVQ Level 3 ‘ Outdoor Education...’.
- Provision is highest in Devon and Cornwall and Gloucestershire;
- Provision is inconsistent across the LSC areas.

3.8.5.6 Gaps in Provision

In order to identify gaps in provision, it is useful to review the combined provision of both work based and FE/HE providers.

Table 3.8.21 combined HE/FE and Workbased NVQ provision in the Sports and Recreation Sub-Sector

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	Total
Sport, Recreation and Allied Occupations	1	15	0	1	8	6	0	30
Sport and Recreation (Facilities Operations)	2	0	0	0	2	0	0	2
Sport, Recreation and Allied Occupations: Activity Leadership	2	186	37	15	4	0	80	322
Sport, Recreation and Allied Occupations: Coaching, Teaching, Instructing	2	5	31	8	4	73	59	180
Sport, Recreation and Allied Occupations: Operations and Development	2	97	13	129	21	18	20	298
Outdoor Education, Development Training, Recreation	3	15	0	7	0	0	0	22
Sport and Recreation (Coaching Adults)	3	0	0	0	0	0	1	1
Sport and Recreation (Supervision)	3	0	0	0	2	0	0	2
Sport, Recreation and Allied Occupations: Coaching, Teaching and Instructing	3	2	3	5	21	0	0	31
Sport, Recreation and Allied Occupations: Operations and Development	3	57	39	132	1	8	2	239
Totals	-	377	123	297	63	105	162	1127

Source: LSC Central Database (FE/HE Provision) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

Table 3.8.21 shows the total provision in the South West for Sports and Leisure NVQs. The key findings are:

- No provision for the Exercise and Fitness or Attractions sub-areas;
- Variable provision across LSC areas for NVQ level 2 – Activity Leadership;
- Good provision of NVQ Level 2 in Coaching and Teaching and Operations and Development;
- No provision for spectator control at any level;
- Some provision for outdoor education Level 3, in Devon and Cornwall and Bournemouth Dorset and Poole;
- Some provision of Level 3 coaching, in all areas except Wiltshire and Swindon and Gloucestershire;
- Some provision of Level 3 operations and development in all areas, Bournemouth, Dorset and Poole – high provision; and
- No Operations and Development provision at Level 4.

Implications of this provision for the Sports and Recreation Sector

The most serious gap in this provision is for Level 4 management qualifications, given the skills gaps identified in the workforce development plans discussed previously. The most serious implication for the non-local tourist market is the lack of provision in outdoor education and the attractions sub-sectors. The lack of qualifications and provision in the south west for health and fitness qualifications is also disturbing given the anticipated growth in employment in this sector.

3.8.5.7 Validation exercise with sectoral experts and stakeholders

The validation exercise was conducted in the same manner as that for the remainder of the Tourist sector. Sport and Leisure is a very disparate sub-area with large overlaps into hospitality and cultural heritage.

Sports and Exercise and Fitness

Within stadiums, the most important areas of staff training relate to stadium control and security. NVQs are not necessarily used to address this, as security managers have other security qualifications. Match day staff are trained by security managers. Coaching NVQs are also important, but the number of people taking NVQs in coaching was considered low, given the number of sports clubs, especially where the coaching of children takes place. Within exercise and fitness, NVQs are used, but companies also use the hospitality range of NVQs.

Outdoors

The National Governing Body awards predominate in this area as well as the PCV driving licence to drive mini-buses. NVQs are useful, but not as important as the NGB qualifications when recruiting staff or free-lancers. NVQs would be more use if they recognised the importance of the NGB qualifications and were somehow incorporated. There is a shortage of instructors in the industry, but this is largely due to pay and conditions. NVQs would not solve this problem as they are not recruitment criteria.

Attractions

The attractions contacted tended not to use NVQs. Some external training was used, but this tended to be in the areas of first aid and health and safety. There was not perceived need for further external training, as they were able to train staff sufficiently well in-house as they know their own business needs.

Caravan/Holiday Parks

NVQs are used in this sub-sector by some establishments and not others. The skills shortages/gaps tended to be in the areas described under hospitality, but in particular, the area of complaints handling. Therefore these companies are also likely to require the NVQs listed under hospitality, such as customer care, food and drink, reception etc.

One company had used the Caravan Park operations NVQ which was useful, but it had to be done through training providers outside the region. The proprietor of this establishment is working with the colleges to develop an NVQ Level 4 in Caravan Park Operations. In terms of gaps in training provision, there is a need for a basic LPG gas training. For their purposes, CORGI registration is far too detailed. One organisation had not used NVQs to date, but saw their use as a potential way of recruiting and retaining better staff and following the interview intended to phone the HtF to get some more information.

3.8.5.8 Recommendations for NVQ provision/progression within Sports and recreation

The following section has two parts:

- The detail of recommendations;
- The fit of recommendations with strategic documents

The detail of recommendations addressing the issues identified by the study;

The mapping and research work, combined with the validation exercise, identified a series of recommendations to help improve NVQ provision and progression for the Hospitality sub-sector in the South West;

- Work with Sports National Governing Bodies to develop industry relevant NVQs, that complement the NGB qualifications that already exist;
- Increase provision of coaching related NVQs and promote within sports clubs;
- Promote the use of NVQs within the attractions and caravans sector as a means of improving staff retention; and
- Include LPG gas training module.

The “fit” of these recommendations with the strategic documents reviewed earlier in the chapter.

None of these recommendations had a fit with the strategic priorities of the workforce development plans or other strategic documents reviewed.

3.8.6 Cultural Heritage

3.8.6.1 Overview – Cultural Heritage

The Cultural Heritage sub-area covers a wide range and type of organisation, including: traditional museums and galleries, stately homes, heritage centres, ancient monuments, zoological gardens, botanical and horticultural collections, industrial and craft premises. Control and funding of the organisations in the sector also varies considerably, with major national collections falling into the public domain and centrally funded, but others split between national organisations, local authorities, independent trusts, church and charities and the private sector⁴⁸.

The sector is facing many challenges including: Government Initiatives; Technological challenges, Human Resource Issues, Commercial Pressures and Social Challenges.

Table 3.8.22 shows the employment in the cultural heritage sector in the South West, as estimated by CHNTO. This estimate is considerably lower than the estimate derived through NOMIS of 12,029. This variation can partially be explained by the inclusion in the NOMIS figures of codes 9232 ‘Operation of Arts Facilities’ and 9237 ‘Artistic and Literary Creation’, which account for 3,517 jobs in the sub-sector which have not been included in the NTO definition. Although artistic and literary creation appear in the SWRDA working paper definition of tourism, it is not an SIC code included within the cultural heritage sector, therefore there is very little information available regarding the issues affecting this sector.

Table 3.8.22 overleaf gives an indication of the employment status and seasonality of the sector. It shows that approximately 65% of the workforce are volunteers and there is extensive seasonality in employment, both paid and voluntary.

⁴⁸ The Cultural Heritage Sector Workforce Development Plan 2001, CHNTO, p.3

Table 3.8.22: Total number of personnel employed in low and high season ⁴⁹

	Low Season	High Season
Employees	1823	2698
Volunteers	3454	4949
Government Training Scheme Participants	24	30
Total	5301	7677

The workforce is relatively highly qualified with: 9% holding a higher degree, 20% a first degree, 20% A-Levels, 29% GCSE or equivalent, 7% AMA/Professional qualifications, 6% trade or craft qualifications, 2% NVQs and only 6% with no qualifications⁵⁰. There is a low level of participation in Government Training Schemes.

The sector has 6 employment categories: management and Administration (18%); care and interpretation of collections (14%); front of house and security (33%); marketing, PR and fundraising (3%); technical and maintenance (10%); and multi-function (23%).

3.8.6.2 Skills Issues

Within the Cultural Heritage sub-area, the following skills and skills gaps were identified (Table 3.8.23);

Table 3.8.23 Skills gaps identified in the cultural heritage sub-area

Industry specific/vocational skills	Generic (interpersonal) Skills	Management	Support Skills	Volunteers	Administration
Archaeologists ^{1,3}	Communication ³	Advocacy/Influencing Others ^{2,3}	Front of House and Security ^{1,3}	Recruitment ³	General Management Skills ³
Book Restorers ^{1,3}	Customer Service ²	Marketing ²	Marketing, PR and fundraising ^{1,3}	Training needs assessment ³	Financial Skills ³
Professional curatorial ² (e.g Conservation ^{1,3})	Interpretative ³	People Management ²	Technical and maintenance ^{1,3}	Training Provision ³	Legal Skills ³
	Promotional ³	Managing Unpaid Staff ²	Engineers ^{1,3}		Fund-raising skills ³
Crafts ^{1,3}	Educational ³	Leadership ^{2,3}	Education/Training ^{2,3}		Marketing skills ³
	Training skills ³	Strategic thinking ³	ICT ^{1,2,3}		Project Management ^{2,3}
	CPD Management ³	Lobbying ³	Research Skill ³		Grant application expertise ³
	Mentoring skills ³	Strategic planning ³	Language ^{1,2,3}		Information Management ³
	Evaluative skills ³	Entrepreneurial Flair ³	Catering ³		Personnel skills ³
		Competition Response Skills ³	Health and Safety ³		Recruitment and selection ³
		Cross Sectoral Perspective ³			Administration ¹
		Partnership and Cooperation Skills ³			
		Access Promotion Skills ³			

Notes:

1 = Skills gap identified in UK Cultural Heritage Labour Market Information Report 1999

2 = Skills in which respondents plan to develop over the next two years – Sector Skills Index 2001 – Cultural Heritage NTO

3 = The Cultural Heritage Sector Workforce Development Plan – 2001 p.11

⁴⁹ UK Cultural Heritage Labour Market Information Report 1999, SW Region, CHNTO fig 3.1

⁵⁰ UK Cultural Heritage Labour Market Information Report 1999, SW Region, CHNTO fig 4.1

As can be seen from the table above, there is a considerable focus on management level skills.

The Cultural Heritage sub-sector is unlike the other tourism sub-sectors, it is facing very different issues such as: Managing volunteers, applying for funding and delivering Government objectives and targets. As described earlier, the demographics of the workforce are also different, with many people coming into the sector from an academic background. As described earlier, the sector has a very diverse range of organisations with many very small establishments. Skills shortages are likely to be greater for smaller organisations in the sector particularly in recruiting craftspeople and volunteers⁵¹.

The CHNTO produced its workforce development plan in 2001, with the following aims:

1. To understand the current and future skills requirements of the sector, and use labour market information to plan for developing people;
2. To ensure that education and training provision meet the Sector's requirements for Lifelong Learning opportunities;
3. To facilitate the take-up of training and development activity by all those who work in the Sector;
4. To work within the principles of Investors in People.

Activities listed under these aims relating to vocational qualifications included:

- Promote the Value of Occupational Standards – CHNTO is keen to see parity between academic qualifications and vocational qualifications.
- Provide a framework of occupationally relevant standards and qualifications – in particular ensuring that the content of training provided is led by the sector, not providers. Of particular concern, is loss of technical expertise and traditional skills in areas such as conservation and technical analysis.

With regard to NVQs and vocational training, the CHNTO Sector Skills Index 2001, states that⁵²:

- The take-up of NVQs/SVQs is relatively low, CHNTO will be demonstrating the potential of NVQs to qualify the workforce at work. In essence an NVQ is the ultimate 'on the job' qualification.
- On the job training requires better structure to improve its effectiveness – CHNTO is working with training providers to develop training packages that can be customised to an organisation's requirement and delivered without marked disruption to the workflow of the staff.

The Cultural Heritage NTO appears to be committed to the use of vocational training and recognises its value in the workplace.

3.8.6.3 Accredited NVQs relevant to the Cultural Heritage Sub-sector.

Table 3.8.24 overleaf lists the NVQs specifically relevant to the Cultural Heritage sub area. They have been based on those identified by:

- The NTOs;
- The DfES qualifications and NVQs database;
- The Qualification Curriculum Authority's Framework of 738 accredited and available NVQs on May 19th 2003; and

⁵¹ UK Cultural Heritage Labour Market Information Report 1999 – South West Region pp.5-6

⁵² Cultural Heritage Sector Skills Index 2001, CHNTO p.5

- The LSC’s central database of work-based learning provided for individual learners 2001-2002.

Table 3.8.24 Accredited NVQs relevant to the Cultural Heritage Sub-Area

Title	NVQ level
Cultural Heritage Operations	3
Cultural Heritage	4
Cultural Heritage Management	5
NVQs not listed by CHNTO, but appear to be relevant	
Cultural Venue Support	2
Museums, Galleries and Heritage (Heritage Care and Visitor Services)	2
Administering Cultural Products Level 3	3
Cultural Venue Administration	3

The table shows that only seven NVQ are available in the cultural heritage sub-area. It shows that progression opportunities exist from levels 2 to 5. There are no qualifications at level 1. However, there does appear to be a reasonable progression route through the NVQ levels and an NVQ Level 5 Cultural Heritage Management is available. This provision is consistent with the management and skills needs identified previously. Having reviewed the content of the NVQs listed by CHNTO, the NVQs also cover the industry specific skills listed previously.

3.8.6.4 Work based NVQ Provision in the South West for Cultural Heritage

Table 3.8.25 below details the extent of work-based NVQ provision specific to the Cultural heritage sub-sector in the region. It shows the number of learners who were:

- Undertaking work-based learning in the year up to June 2002;
- Registered on the NVQ/MA shown; and
- Resident in a postcode of the relevant South West LSC area or, if not resident in a South West postcode, registered with the LSC shown.

Table 3.8.25: South West NVQ/MA Work-Based provision in the Cultural Heritage sub-area: Number of learners 2001-02

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
NVQs not listed by CHNTO, but appear to be relevant								
Cultural Venue Administration	3	0	6	0	0	0	0	6
Museums, Galleries and Heritage -collection care	3	1	0	0	0	0	0	1
Total		1	6	0	0	0	0	7

Source: LSC Central Database (Workbased) Interim Individualised Learner Data 2001-2002
 Note: NVQ titles with 0 learners have been excluded from this table.

The table above shows that there is virtually no work-based provision in the region – with just seven learners in total in Somerset and Devon and Cornwall at Level 3.

3.8.6.5 FE/HE Provision in the South West for Cultural Heritage

Table 3.8.26 below contains details of the extent of NVQ provision through FE and HE colleges specific to the Cultural Heritage sub-area in the South West. It shows the number of learners who were:

- Registered for the academic year 2001-2002;
- Registered on the NVQ/MA shown; and
- Registered with a FE/HE college situated in the South West.

Table 3.8.26: South West NVQ/MA FE/HE provision in the Cultural Heritage sub-area: Number of learners 2001-02

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
Cultural Heritage	4	0	0	1	0	0	0	1
Total		0	0	1	0	0	0	1

Source: LSC Central Database (FE/HE Provision) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

The table above shows that there is only one learner participating in the NVQ Level 4 qualification 'Cultural Heritage' - in Bournemouth Dorset and Poole.

3.8.6.6 Gaps in Provision

At a national level, the accredited NVQs available cover the skills needs identified in the literature. However at the South West level, there has been virtually no take-up of these qualifications through either the work-based or FE-HE route. Thus there are gaps throughout the sub-area – in terms of the number of learners, course type and geography. Given the challenges facing the sector and the number of establishments and employees within the South West, this is a serious problem for the sector.

3.8.6.7 Validation exercise with sectoral experts and stakeholders

The validation exercise was undertaken in the same way as previously described. It confirmed that staff training tended to be onsite, with some external courses provided in areas like customer care and welcome host. Organisations with 'head offices' often sent staff on centrally run courses. In organisations with a strong knowledge or science background staff sometimes undergo additional learning through links with universities.

Some organisations had used NVQs for staff training, however, these tended to be in areas such as the support services, e.g. retail, customer care, reception etc. Some had used NVQs in specific areas such as gardening or animal care. None of the organisations spoken to were aware of the CHNTO cultural heritage NVQs. Few organisations saw a role for these NVQs. This is for the following reasons:

- NVQs were perceived to be for school leavers, or an entry level qualification and were therefore not appropriate for people with degrees;
- Many people at management/curatorial level had degrees such as archaeology, museum studies etc. They could not see how an NVQ would benefit them;
- There was a perception that knowledge was the most important skill and this could not be gained from an NVQ. Few respondents recognised the need for management or generic skills or that NVQs could address these areas;
- There was also a perception by some that NVQs did not teach anything new, that there was no training input;
- Some respondents were open to finding out some more about NVQs.

Given that few people had heard of the relevant NVQs, or thought NVQs were entirely inappropriate for their sector, few respondents were in a position to comment on the numbers achieving these NVQs, although some did think provision should be increased.

3.8.6.7 Recommendations for NVQ provision/progression within Cultural Heritage

The following section has two parts: the detail of the recommendations; and the “fit” of these recommendations with the strategic documents reviewed earlier in the chapter.

The detail of recommendations addressing the issues identified by the study

It is clear from the literature review that there are skills gaps within the sector and this is frequently in the area of management skills, rather than knowledge. It is these skills that are gained in the workplace rather than university and are therefore ideally suited to the use of NVQs. Therefore to improve the uptake in the sector the following actions need to be taken:

- **Overcoming the perception that NVQs are an entry level qualification –** This is currently a large barrier to uptake which needs to be solved through effective marketing such as:
 - Promotional material explaining what an NVQ is and the nature of its contents distributed through the following channels:
 - To graduates of relevant cultural heritage degrees;
 - Through professional organisations and associations;
 - Directly to organisations in the sector.
- **Increased ownership of the Cultural Heritage NVQs –** For organisations in the sector to utilise NVQs they need to have confidence that they are relevant to their needs and that the qualification will be recognised and valued by others in the sector. The new sector skills council for cultural heritage should consider reviewing the current NVQs for industry relevance by conducting a consultation with the industry. It should also seek practical support for these NVQs from key organisations in the sector who will then be able to champion NVQs to other smaller organisations in the sector.
- **Improved learning through NVQs –** for NVQs to become widely taken up, NVQs need to deliver the learning outcomes sought by industry. There is a perception that this is not the case. CHNTO is working with training providers to develop training packages that can be customised to an organisation’s requirement and delivered without marked disruption to the workflow of the staff. This needs to continue.

The “fit” of these recommendations with the strategic documents reviewed earlier in the chapter.

All three recommendations have a fit with the CHNTO Workforce Development plan which seeks:

- To promote the value of occupational standards and gain parity between academic qualifications and vocational qualifications;
- Ensuring that the content of training provided is led by the sector, not providers;
- Demonstrating the potential of NVQs to qualify the workforce at work;
- Improving the structure of on the job training to improve its effectiveness

3.8.7 Travel, Tourism and Events

3.8.7.1 Overview – Travel, Tourism and Events

Like other sectors, the Travel, Tourism and Events Sector is a diverse one, ranging from travel agents, tour operators, tourist information centres, event organisers exhibitors and venue providers. Official statistics do not adequately cover the sub-sector, therefore, it is not possible to get an accurate picture of employment in the South West. Nationally, SPIRITO estimates that the Annual Business Inquiry underestimates the number of people employed in the sector by one third⁵³. Applying this assumption to South West data, puts the estimate for the number of people employed in the sub-sector up to approximately 9,600. SPIRITO estimates that the travel sector is the largest sector, with 80% of businesses, followed by tourism services (11%) and events (8%).

In terms of employment trends, the sector has experienced net employment growth, however it is apparent that a good proportion of the vacancies represent replacement, rather than additional demand. Net growth is relatively small in comparison to the volume and scope of overall employment and occupational change and dynamics. Overall, it is expected that more jobs will be created in the sector as, over the medium term, sustained economic growth has resulted in strong employment growth.

In terms of demographics of the workforce, it is recognised that the majority employed in travel are under the age of 35 and the workforce in events is quite young. The demographics of tourism services are slightly different due to the employment of a more mature workforce – hence no take-up on MA programmes and guides are also, often, more mature people.

The Sector Workforce Development plan identifies two issues for the sector to tackle in relation to retention of staff, both driven by labour market “churn” and “leakage”. Relatively high rates of labour market “churn” are affecting specific employers and cut across a wide range of staff. The problem of “leakage” of skilled and experienced staff to other sectors is a problem with skilled staff leaving in greater volumes than employers can find replacements, which will ultimately lead to a net skills loss.

3.8.8.2 Skills Issues

Travel

NVQ candidates in this sector tend to be those on Modern Apprenticeship schemes. Candidate registrations have tended to concentrate on level 2 and 3 qualifications in travel services. Other NVQs have shown low take-up. Research has shown that there is little interest in the customer service NVQs. There is low take-up of higher level qualifications in the travel sector and this is thought to reflect the sector's attitude to on-going training and staff development⁵⁴.

⁵³ Sector Workforce Development Plan – TTENTO 2002 p11. N.B. The remainder of this section is drawn from this document

⁵⁴ Skills Foresight Report – TTENTO p.10 N.B. The remainder of this section is drawn from this document

Tourism Services (National and regional tourist boards, Tourist Information Centres (TICs), Tour managers and Guiding)

Staff in TICs access a wide range of qualifications, including, GNVQs, customer Service NVQ/SVQs, degree and postgraduate degrees. Common disciplines are language and tourism management. There is still however, a low take-up of NVQs in the tourism services sector. It can be inferred from this low take-up that MA/NT programmes have not been fully taken on board by this sector. Tour Managers and guides frequently hold the internationally recognised Blue Badge qualification. This is a knowledge based award, rather than competency based and it is held in high esteem for a substantial number of guides in the sector. Staff Turnover in this sub-sector is low.

Events (Event Organisers, Event venue providers, event suppliers, exhibitors and temporary structures).

In the events sub-sectors NVQs have been developed at levels 2, 3 and 4 to cater for event organisers, venue providers, exhibitors and suppliers. The Events (Temporary Structures) qualifications cover the specialist area of erecting, dismantling and managing temporary structures. There are no other industry qualifications for these NVQs relating to Temporary Structures to compete with.

The TTENTO workforce development plan reported the following future skills demand⁵⁵:

For new entrants to the sector:

- A need for IT;
- Improving own learning and performance;
- Working with other people;
- Communications and oral and numeracy skills

For practitioners:

- Customer relation skills;
- Administrative/organising skills;
- Face to face selling skills;
- Telephone skills; and
- Marketing skills.

For supervisors and managerial staff:

- Customer relation skills;
- Marketing skills;
- Staff management skills;
- Personal organisation skills; and
- Administration/organisation skills.

Sector specific skills that were considered important for practitioner, supervisory and management recruits included product knowledge skills and IT skills together with recognition that the latter would increasingly be required over the next five years.

The sector Skills Foresight Report has identified the following specific skills required for the future by sub-sector:

⁵⁵ Sector Workforce Development Plan 2002, TTENTO p.16

Travel⁵⁶

- Sales and customer services including pricing, designing, shop layout, identifying with the customer and closing sales;
- Development of business skills involving strategic management, more complex negotiating skills, benchmarking financial management, research, knowledge of new work related legislation and time management;
- Information Technology.

Tourism Services

- New technology as well as specific web and internet skills;
- Customer service and sales skills including skills for attracting and satisfying new customers as well as retaining existing ones;
- Financial Skills.

Events

- Customer care and marketing skills;
- New technology and the internet;
- Language skills;
- Training;
- Management of sub-contractors; and
- Adapting to working from home.

As well as the familiar barriers to training, such as lack of time, the TTENTO Skills foresight report identifies the 'attitude of the sector's management towards training and staff development' as an important barrier to training. There is also a concern that the sector may be developing an increasing skills gap as far as general management skills are concerned.

The TTENTO Workforce Development Plan has five priority areas for action of which 2 are of particular relevance to this study:

1. Address generic, personal and elementary occupational skills deficiencies; and
2. Promote a more positive approach to, and wider take up of, qualifications.

The plan suggested five measures to address priority 2:

- Review and rationalise the provision of education and learning opportunities and ensure those that are best placed to meet employer needs are fully promoted to employers;
- Develop the relevance and perceived 'value' of training and education opportunities available;
- Promote the development and input of sector recognised 'technical' or experience and knowledge based inputs into education and training opportunities;
- Develop and target specific skills development and, where appropriate, qualifications, at specific levels of existing employees and recruits;
- Address gaps in particular sector-specific qualifications - from NVQs through to HNC/D and degree level courses in order to make them more agreeable to employers.

⁵⁶ Skills Foresight Report, Dec 2000-Dec 2004, TTENTO p.31 N.B. The remainder of this section is drawn from this document

3.8.7.3 Accredited NVQs in Travel, Tourism and Events

Table 3.8.27 below lists the NVQs specifically relevant to the Travel, Tourism and Events sub-area. They are again based on those identified by:

- The sub-sector NTOs;
- The DfES qualifications and NVQs database;
- The Qualification Curriculum Authority's Framework of 738 accredited and available NVQs on May 19th 2003; and
- The LSC's central database of work-based learning provided for individual learners 2001-2002.

Table 3.8.27: Accredited NVQs relevant to the Travel Tourism and Events sub-area

Title	NVQ level
Travel	
Travel Services (Leisure and Business)	2
Travel Services (Leisure Travel, Business Travel, Call Centre Operations)	2
Travel Services (Tour Operations - Head Office Operations)	2
Travel Services (Tour Operations - Resort Operations)	2
Travel Services (Tour Operations)	2
Travel Services	3
Travel Services (Leisure and Business Travel)	3
Travel Services (Leisure and Business)	3
Travel Services (Supervising)	3
Travel Services (Tour Operations - Head Office Operations)	3
Travel Services (Tour Operations - Resort Operations)	3
Travel Services (Tour Operations)	3
Travel Services (Leisure and Business Travel)	4
Travel Services (Tour Operations)	4
Tourism	
Tourist Information	3
Travel Services (Commentaries and Interpretation for Tourism)	2
Travel Services (Commentaries and Interpretation)	2
Travel Services (Commentaries and Interpretation for Tourism)	3
Travel Services (Commentaries and Interpretation)	3
Travel Services (Tour Operations)	3
C&G Level 4 NVQ in Travel Services (Guiding and Tour Managing)	4
Travel Services (Guiding and Tour Managing)	4
Travel Services (Guiding and Touring Managing)	4
Travel Services (Tour Operations)	4
Events	
Events	2
Events	3
Events	4
Events – Temporary Structures	2
Events – Temporary Structures	3
Events – Temporary Structures	4

The table shows 30 available NVQ qualifications in the Travel, Tourism and Events sub-area. It also shows that there are no qualifications at level 1 and 5. Within these titles there is reasonable progression opportunities, with most providing the opportunity to progress to at least one other level, in most cases two other levels.

TTENTO documentation reveals that occupational standards have been prepared for the following occupation: Tourist Information Services – Level 2. However, no accredited NVQ was found for this occupational standard. Having reviewed the TTENTO occupational maps⁵⁷ for the sub-sectors, the NVQ provision for this sub-sector is very good, with few gaps in the provision of NVQs.

⁵⁷ Qualifications and Careers Map - TTENTO

3.8.7.4 Work-Based NVQ Provision in the South West for Travel, Tourism and Events

Table 3.8.28 below contain details of the extent of work-based NVQ provision specific to the Travel, Tourism and Events sub-sector in the South West. It shows the number of learners who were:

- Undertaking work-based learning in the year up to June 2002;
- Registered on the NVQ/MA shown; and
- Resident in a postcode of the relevant South West LSC area or, if not resident in a South West postcode, registered with the LSC shown.

Table 3.8.28 South West NVQ/MA Work-Based learning provision in the Travel, Tourism and Events sub-sector: Number of learners 2001-02

Title	NVQ level	D&C	S	BDP	WoE	W&S	G	South West
Travel								
Travel Services	FMA	2	1	0	0	0	2	3
Travel Services	AMA	3	21	0	0	121	0	142
Travel Services (Leisure and Business Travel)	AMA	3	7	0	0	289	0	296
Travel Services (Supervising)	AMA	3	1	0	0	0	0	1
Travel Services (Tour Operations)	FMA	2	2	0	0	0	0	2
Travel Services (Tour Operations)	AMA	3	4	0	0	0	0	4
Tourism								
Tourist Information	AMA	3	1	0	0	0	0	1
Totals			37	0	0	410	0	449

Source: LSC Central Database (workbased Provision) Interim Individualised Learner Data 2001-2002

Note: NVQ titles with 0 learners have been excluded from this table.

The table above shows that work-based NVQ provision in the sector is very poor. The table shows the following:

- For all but two of the 30 NVQs accredited in this sector, there is virtually no work-based provision in the South West;
- There is no provision at all in the events sub-sector;
- There is very limited provision in the Tourism sub-sector;
- The travel sub-sector has the highest level of provision, but this mainly comes from two AMA's in Travel Services which are very popular in the West of England.

3.8.7.5 FE/HE NVQ provision in the South West for Travel, Tourism and Events

Table 3.8.29 below contains details of the extent of NVQ provision through FE and HE colleges specific to the Tourism, Travel and Events sub-area. It shows the number of learners who were:

- Registered for the academic year 2001-2002;
- Registered on the NVQ/MA shown; and
- Registered with a FE/HE college situated in the South West.

The table shows that, as with work-based provision, FE/HE provision for the sub-area was also very poor across the region.

Table 3.8.29: South West NVQ/MA FE/HE provision in the Travel, Tourism and Events sub-sector: Number of learners 2001-02

Title	NVQ Level	D&C	S	BDP	WoE	W&S	G	South West
Travel Services (Leisure and Business)	2	25	0	0	8	0	0	33
Travel Services (Leisure and Business)	2	8	0	0	0	0	0	8
Tourist Information	3	2	0	0	0	0	0	2
Travel Services (Leisure and Business)	3	5	0	0	0	0	0	5
Totals		40	0	0	8	0	0	48

Source: LSC Central Database (FE/HE Provision) Interim Individualised Learner Data 2001-2002

The table above shows the four NVQ titles that have had learners participating in the courses through the FE/HE route during 2001-2002. This shows that:

- For most NVQs accredited in this sector, there is no FE/HE provision in the South West;
- Most of the provision is in Devon and Cornwall and in Travel Services Levels 2 and some provision at Level 3.
- There is some provision in the West of England in Travel Services level 2.

3.8.7.6 Gaps in Provision

Two parts of this sub-area have an important role maintaining the 'visitor experience' in the region: the Tourism and Events industries. Given the size of the incoming tourism market in the South West, it is of strategic importance that the visitor experience is a good one, whether they are visiting a tourist information centre or attending an event. The provision and take-up of NVQs in these sub-sectors should reflect this.

However, the number and location of learners reveal gaps across the sector. Furthermore, under the skills needs identified earlier in this report, many of the skills required in the industry were not industry specific, such as ICT, retail, customer care etc. Therefore it is possible that employees in the industry are utilising other business orientated NVQs to address particular skills gaps, rather than the industry specific skills NVQs listed above.

3.8.7.7 Validation exercise with sectoral experts and stakeholders

The validation exercise confirmed that within the travel sub-sector, companies tended to have rigorous internal induction training, followed by regular updates and training for existing staff. This focused on product awareness, booking systems and destinations. Training was frequently provided by suppliers (in terms of product and destination awareness) and in the cases of large groups by the head office.

The companies spoken to had not used the range of travel NVQs, although they thought the range was sufficient. One respondent was able to comment on the use of NVQs by the industry generally. She thought that they were commonly used by the larger groups through the intake of modern apprenticeships. Although she thought their primary motivation for recruiting the school leavers was the reduction in staffing costs and that the employees would frequently be 'dumped' on completion of the modern apprenticeship as they become more expensive to employ. This is consistent with the data on NVQ uptake provided earlier in the chapter. In terms of changing the NVQs, it was thought that time in college is beneficial from a social perspective to the trainee.

Of those that did not wish to participate in the research it was frequently because they did not perceive that they had a training need and that NVQs were for new entrants, not experienced staff.

Within Tourist Information, training again follows a rigorous induction process where staff are trained in using the IT systems to make bookings. South West Tourism was also used to provide training under 'network TIC' and welcome host. Skills issues related to keeping up with IT developments.

Many employers reported that NVQs had been used to some extent, but in areas like IT, customer service. One respondent was aware of the Tourist Information NVQ at Level 3. In relation to the provision it was suggested that this should be made available at Level 2, so that staff, not just management could benefit from it. A problem was also identified in terms of funding for those over 25. NVQs were perceived by some to be useful to give staff a confidence boost and to help them understand just how much they know and could do. They were also perceived to be a good way of developing young people, but more experienced staff do not need NVQs.

The events sub-sector tended to perceive training as something that was not relevant to experienced staff. In particular they tended to perceive NVQs as a new entrants qualification, rather than CPD.

Of those that were willing to discuss staff development issues, skills shortages related to: new developments, technology, lighting design, computing etc. One person was able to comment on the range of NVQs available because she had been looking to do an NVQ herself and found the range available insufficient. She felt that there needed to be an NVQ to cover the creative aspects of event management, such as niche set design and exhibitions. She thought the range of NVQs on offer were too simplistic.

3.8.7.8 Recommendations for NVQ provision/progression for Travel, Tourism and Events

The following section has two parts: the detail of recommendations; and the fit of recommendations with strategic documents

The detail of recommendations addressing the issues identified by the study;

The mapping and research work, combined with the validation exercise, identified a series of recommendations to help improve NVQ provision and progression for the Tourism, Travel and Events sub-sector in the South West;

- Work with companies in the sector to encourage the use of NVQs as an integral part of CPD for all staff;
- Make the NVQ Tourist Information available at Level 2;
- Provide funding for those over 25 to do NVQs;
- Market NVQs via Local Authority Tourism Officers; and
- Develop an NVQ to cover the creative aspects of Event Management.

The “fit” of the recommendations with the strategic documents reviewed earlier in the chapter.

The following recommendations fit with the strategic documents reviewed earlier in the chapter:

- Work with companies in the sector to encourage the use of NVQs as an integral part of CPD for all staff; This fits with the TTENTO workforce development plan which has the following priorities:
 - *Promote a more positive approach to, and wider take up of, qualifications;*
 - *Develop a more positive career path and promote continuing professional development (SPD) in the sector.*