



# A Scoping Study into the Catering and Hospitality Sector in Wales

## Final Report

To the Vale of Usk Local Action Group

September 2017



Lead Author:

Sam White

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# 1 Executive Summary

## Introduction

- This report documents the findings of a scoping study into the catering and hospitality sector in the Vale of Usk<sup>1</sup>. The study was undertaken by Miller Research on behalf of the Vale of Usk Local Action Group (LAG)<sup>2</sup> and Monmouthshire County Council between October 2016 and July 2017.

## Purpose of the Study

- The purpose of the study was to gather evidence to understand how the Vale of Usk can build on the region's reputation by understanding the catering education needs in the area – with a very specific view to exploring the potential for the area to become a centre for culinary education excellence. The need for the study was driven by one of the five objectives of the Vale of Usk partnership, as specified in the Local Development Strategy (LDS),

*To identify pre-commercial rural enterprises, to engage through a rural mentoring network, business to business supply network, targeted towards sector specific beneficiaries;*<sup>3</sup>

Coupled with the recognition in the LDS that one of the strengths of the Vale of Usk is its 'food brand'<sup>4</sup>, there is a recommended action in the long-term sustainability, mainstreaming plan under Theme Two (Action 3):

*To extend knowledge from Made in Monmouthshire and other food related initiatives into the wider territory that integrates experiences and develops unique offers in terms of food heritage and food linked to activity tourism.*<sup>5</sup>

## Research Methodology

- The research comprised a mixed-methods approach of in-depth, qualitative research coupled with a large-scale quantitative survey of catering and hospitality businesses in the Vale of Usk. A telephone survey of 100 catering and hospitality businesses<sup>6</sup> was carried out between the 13<sup>th</sup> April and 1<sup>st</sup> June 2017. In-depth, qualitative interviews were carried out with 12 industry stakeholders located within the Vale of Usk area through a mixture of face-to-face and telephone interviews.

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<sup>1</sup> The Vale of Usk LAG territory covers the rural wards of Monmouthshire and Newport (see Appendix 1).

<sup>2</sup> The Vale of Usk Local Action Group (LAG) was established in 2014 to oversee the governance, strategic direction and delivery of the Vale of Usk 2014–20 Local Development Strategy, which is funded via the Rural Development Programme and Welsh Government.

<sup>3</sup> LEADER 2014–2020 Vale of Usk Local Development Strategy Version 2, March 2015, pg. 32.

<sup>4</sup> LEADER 2014–2020 Vale of Usk Local Development Strategy Version 2, March 2015, pg. 56.

<sup>5</sup> LEADER 2014–2020 Vale of Usk Local Development Strategy Version 2, March 2015, pg. 63.

<sup>6</sup> The research universe for this study was businesses in the Vale of Usk and surrounding area that served food that was prepared on-site and also that classified themselves as providing either 'fine dining' or 'casual dining / gastro / pub food'. Businesses who described themselves as a 'Café / coffeehouse / cafeteria' or as serving 'fast food' were excluded from the study.

## Research Findings

### Perceptions of the Vale of Usk

- Survey respondents highly rated all aspects of the hospitality sector in the Vale of Usk. The Vale of Usk's festivals – specifically the Abergavenny Food Festival, was the highest ranked aspect of the industry in the Vale of Usk among survey respondents. In general, survey respondents from outside the Vale of Usk rated the area lower than those from within the region.
- This suggests a need for more external awareness raising of what the Vale of Usk has to offer, or some self-reflection within the area about the reality of what it has to offer. Stakeholders also commented positively about Monmouthshire as Food Capital of Wales – noting its food heritage, produce, scenery, and the Abergavenny Food Festival as particularly strong points.

### Industry Perceptions & Career Paths

- Three quarters of organisations interviewed during the telephone survey agreed with the statement that young people had an unfavourable perception of a career in catering and hospitality. Demands of the job and a lack of work ethic of new entrants were cited as the main reasons for poor perceptions. Only those who fully understand the sector and who are committed to a career that remain in the industry and are able to progress. There is a need to build awareness and to instil a desire within young people to choose catering as a career choice, rather than seeing it simply as 'just a job'.
- Three quarters of the survey sample sourced 'some' food and drink from the Vale of Usk, rising to 86 per cent for those located within the area.

### Size of the Industry

- 210 enterprises employ approximately 4,500 people in the Vale of Usk catering and hospitality industry. Approximately 718 (16%) of these are chefs or cooks. The proportion of people employed in the catering and hospitality sector in the Vale of Usk as a share of all employment, is greater than that of the rest of Wales and Great Britain. It is therefore an important employment sector for the region.
- There are more part-time workers than full-time workers in the sector and most of the work is at the lowest skill level (54% at the lowest occupation level). Hotels account for the largest share of employment in the sector (44%). The data suggests that licensed restaurants in the Vale of Usk are smaller on average (employ fewer people) than restaurants across Wales and Great Britain as a whole.

### Skills Needs and Gaps

- Skills gaps / expertise are more prevalent among new recruits rather than existing employees. Most skills gaps are linked to the underlying issue among new (younger) industry entrants' poor perceptions of the industry. One in ten respondents suggesting that work ethic, attitude and enthusiasm were attributes lacking among younger members of staff.

- Executive (head) chefs are the hardest vacancies to fill - largely because of a general shortage of chefs on the market. Many hotels and restaurants in the area currently have vacancies for chefs and particularly executive chefs.
- There is a need to firstly improve perceptions of the industry as a career, and secondly, to develop new staff by giving them the experience they need to address skills shortages – namely executive chefs.

### **Existing Provision**

- In general, catering and hospitality provision covers a skills spectrum from Level 1 (entry level skills) of the CQFW, to Level 4. There are also accredited courses offered by private training providers such as a BTEC Apprenticeship in Craft Cuisine; a practical and theory-based course for professional chefs.
- In the 2015/16 academic year 825 students enrolled on a catering and hospitality related course at Coleg Gwent – the primary suppliers of public-funded FE provision in the Vale of Usk.
- 93 per cent of businesses train in-house, peer to peer. Only one in five uses external providers for in-house training and only one in ten uses a local college. 96 per cent are satisfied with the current level of training provision – however, skills gaps are prevalent among new employees, linked to attitudes and general ability.
- Coleg Gwent provision is primarily full-time / part-time, classroom based. Thus, suggesting a gap for informal training considering the preference of on-the-job training in the sector.

### **Recruitment**

- Word of mouth and recruitment agencies are the primary methods for finding staff. Social media and the ‘chef grapevine’ were cited as particularly useful for some, although industry publications are also used.
- A high number of poor quality applicants for lower level occupations was frequently mentioned as an issue for many organisations, especially smaller companies. Staffing and recruitment challenges persist – specifically recruiting those with serious interest

### **Future Employment Needs and Growth Expectations**

- One in five (22 per cent) of surveyed businesses plan to expand. Primary growth plans are to expand existing site. Challenging times (economically and culturally) – the restaurant food culture is undergoing change. Survey respondents feel the Vale of Usk needs more advertising, marketing & publicity of the food offering in the area

### **The need for an Education Establishment**

- The findings of the business survey were conclusive in their support for either a new catering establishment (56 per cent) or a virtual academy (20%). Only 22 per cent indicated a preference to continue with the existing training offer. 93 per cent of those interested in becoming part of a network were prepared to offer training or mentoring to

other businesses. A training facility offering a combination of on-site and bespoke academy / apprenticeship style training appears to most effectively meet industry need.

### Conclusions

- The research has shown that current accredited provision provides a steady stream of lower-level skilled employees into the industry – however there is a lack of ongoing professional development to meet needs – which is thought to contribute towards the high number of hard to fill executive chef level vacancies.
- Furthermore, among new entrants there is a lack of understanding about the high demands of the industry and a perception of poor career progression. There is clearly a need therefore, to put in place more structured career paths which develop the necessary talent and helps to dispel the poor career perceptions.
- The research has shown a clear demand for a new establishment to provide bespoke, non-accredited training, which delivers higher-end skills, in a way which fits with business needs (i.e. on-the-job). They expressed a high level of support for such an establishment (76 per cent of survey respondents felt there was a need for some form of education establishment), which was seen as way to spread the burden (and costs) of upskilling staff across a network of businesses. And importantly, one which could lead to the development of the type of staff they are looking for. That is, people who are highly skilled and knowledgeable about local and seasonal food sourcing and production, as well as having catering and hospitality business acumen – coupled with a commitment to further their careers in the industry.
- Of note, the ability to source, use and then sell local and seasonal food – i.e. by selling the back story to local food, are sought after skills for which there is no existing provision.
- The research suggests that the provision the catering college provides is unaccredited, bespoke training built around a core theme of utilising locally sourced produce (70 per cent of the sample already source within Vale of Usk) and selling the area as a food destination (28 per cent felt that more advertising / marketing or publicity of the food offering in the area would help to strengthen the industry). These are the type of skills that are accumulated by existing chefs and hospitality professionals through experience and which, through an academy like this, can be passed on to the next generation of executive chefs.

### Recommendations

- This report recommends that a new catering establishment should be created in the Vale of Usk, in association with the Abergavenny Food Festival, Made in Monmouthshire, Coleg Gwent, and other local stakeholder groups. In doing so, this will make a direct contribution towards the Local Action Group's LDS recommendation to extend the knowledge, integrate experiences and develop a unique food offer.
- The establishment would provide a central hub for a programme of training and masterclasses - driven by the needs of employers and delivered by a newly established

Vale of Usk chef network, and financially supported by opening to the general public. In doing so, addressing the objective of the Vale of Usk Partnership to engage through a rural mentoring network, business to business supply network.

- It is recommended that the facility utilises existing facilities at first on a pilot phase basis (for example 1 to 2 years of delivery) with a view to identifying new / refurbished premises thereafter- should the pilot prove to be successful.
- The establishment would be accessible to college leavers, industry employees and the general public, focussing on mentoring / masterclass style peer to peer training which addresses industry needs. Local produce sourcing knowledge/use, and sales and marketing skills (i.e. telling the back story to local food production and use) should be a focus on the training/mentoring provided.

## 2 Introduction

This report documents the findings of a scoping study into the catering and hospitality sector in the Vale of Usk<sup>7</sup>. The study was undertaken by Miller Research on behalf of the Vale of Usk Local Action Group (LAG)<sup>8</sup> and Monmouthshire County Council between October 2016 and July 2017.

The report has the following structure:

- Chapter 1 – Executive Summary
- Chapter 2 – Introduction
- Chapter 3 – Research Methodology
- Chapter 4 – Research Findings
- Chapter 5 – Conclusions and Recommendations

### 2.1 Purpose of the Study

The Vale of Usk sits within the local authority of Monmouthshire, the self-declared 'Food Capital of Wales'. Described on Visit Monmouthshire's website as a "place to sample real, traceable local food, packed with flavour and perfectly presented"<sup>9</sup> the area is renowned for its relative strength in award winning food producers and destination restaurants, and a nationally recognised annual food festival in Abergavenny.

If the area is to maintain and develop its status as Food Capital of Wales, there is an implied need for the highest standards of catering and hospitality to be in place. Whilst this implies the highest standard of staffing and training are required, there is anecdotal evidence to suggest that the food and drink sector in the region suffers from gaps in skills and expertise, potentially compromising the ability of the region to live up to its title. This study aimed to gather evidence to substantiate these sentiments and to challenge common perceptions. Research questions were developed by the Vale of Usk LAG to be answered through this study. They were:

- What is the size (employment and number of businesses) of the catering and hospitality industry in the Vale of Usk?
- What are the future employment needs of the sector?
- What are the preferred methods of recruitment?
- What are the current skills needs of the sector?
- What is the current level of further and higher education provision in the sector?
- What are the preferred career routes and aspirations of potential students?

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<sup>7</sup> The Vale of Usk LAG territory covers the rural wards of Monmouthshire and Newport (see Appendix 1).

<sup>8</sup> The Vale of Usk Local Action Group (LAG) was established in 2014 to oversee the governance, strategic direction and delivery of the Vale of Usk 2014–20 Local Development Strategy, which is funded via the Rural Development Programme and Welsh Government.

<sup>9</sup> <http://www.visitmonmouthshire.com>

In addition to the research evidence required to address the points above, the study set out to explore how the Vale of Usk can build on the region's reputation by understanding the catering education needs in the area – with a very specific view to exploring the potential for the area to become a centre for culinary education excellence. In part, this requirement was driven by one of the five objectives of the Vale of Usk partnership, as specified in the Local Development Strategy (LDS), which is:

*To identify pre-commercial rural enterprises, to engage through a rural mentoring network, business to business supply network, targeted towards sector specific beneficiaries;*<sup>10</sup>

Coupled with the recognition in the LDS that one of the strengths of the Vale of Usk is its 'food brand'<sup>11</sup>, there is a recommended action in the long-term sustainability, mainstreaming plan under Theme Two (Action 3):

*To extend knowledge from Made in Monmouthshire and other food related initiatives into the wider territory that integrates experiences and develops unique offers in terms of food heritage and food linked to activity tourism.*<sup>12</sup>

Clearly, the LDS has expressed a need to develop the food offer in the region – and specifically to transfer knowledge in order to capitalise on one of its perceived strengths. This need has driven the rationale for the study to explore the potential for a catering education establishment in the Vale of Usk. Thus, the final research questions which this study set out to address are:

- Is there demand for a new catering establishment / college specifically created to address skills needs in the area?
- Should such an establishment be virtual (i.e. centred on existing assets and available to people outside of the area as well as people within the industry) or physical?
- Should such an establishment be wholly vocational in an educational establishment or on-site education/training via a bespoke apprenticeship programme or modular training provision?

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<sup>10</sup> LEADER 2014–2020 Vale of Usk Local Development Strategy Version 2, March 2015, pg. 32.

<sup>11</sup> LEADER 2014–2020 Vale of Usk Local Development Strategy Version 2, March 2015, pg. 56.

<sup>12</sup> LEADER 2014–2020 Vale of Usk Local Development Strategy Version 2, March 2015, pg. 63.

### 3 Research Methodology

The research comprised a mixed-methods approach of in-depth, qualitative research coupled with a large-scale quantitative survey of catering and hospitality businesses in the Vale of Usk. The LDS<sup>13</sup> for the Vale of Usk Local Action Group defines its territory as covering the rural wards (electoral) of Monmouthshire and Newport. The full list of wards falling within this boundary is detailed in Appendix 1.

A telephone survey of 100 catering and hospitality businesses<sup>14</sup> was carried out between the 13<sup>th</sup> April and 1<sup>st</sup> June 2017. For the purpose of this study, a definition of 'catering and hospitality' was developed using Standard Industrial Classification (SIC) codes, so that it could be matched to existing datasets<sup>15</sup>. The full list of SIC codes included in the definition as well as additional screening criteria can be found in Appendix 2. The survey questionnaire which was constructed to cover the breadth of study aims and objectives can be found in Appendix 3.

Table 1 Vale of Usk Catering Study: Industry Perception Survey – Breakdown of Respondent Sample by Type and Size

Category: Type	#	Category: Employees	#
Hotels / guest houses	12	1 to 4	28
Restaurants	25	5 to 9	24
Pubs	57	10 to 19	19
Guest Houses	4	20 to 49	16
Catering	2	50+	3
<b>Total</b>	<b>100</b>	<b>Total</b>	<b>90 (10 unknown)</b>

Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017.

Table 1 shows the breakdown of the sample of respondents for the business type and number of employees (size). All respondents were screened to ensure they fitted within the catering and hospitality definition by SIC codes so that target companies could be identified. The survey was initially carried out within the Vale of Usk wards only, until the sample had been exhausted. It was subsequently rolled out to the outlying wards until the target sample size (100) had been met. In total, 56 respondents were located within the Vale of Usk and 44 outside. The survey results were analysed and the findings are detailed in Chapter 4 of this report.

In-depth, qualitative interviews were carried out with 12 industry stakeholders located within the Vale of Usk area through a mixture of face-to-face and telephone interviews. The stakeholders were chosen collaboratively by the Vale of Usk LAG and our research team, to cover:

<sup>13</sup> Vale of Usk Local Development Strategy available at: [<http://www.monmouthshire.gov.uk/app/uploads/2015/04/4a-150306-Vale-of-Usk-LDS-resubmission.pdf>], page 6.

<sup>14</sup> The research universe for this study was businesses in the Vale of Usk and surrounding area that served food that was prepared on-site and also that classified themselves as providing either 'fine dining' or 'casual dining / gastro / pub food'. Businesses who described themselves as a 'Café / coffeehouse / cafeteria' or as serving 'fast food' were excluded from the study.

<sup>15</sup> To enable the identification of target companies and also to enable comparison with national datasets. The definition was agreed with the LAG prior to the research being undertaken.

- Those companies expected to have the potential to engage with a hospitality and catering training academy, and;
- Those thought to be influential in the sector; either because they are significant employers or because they have influence over the development of the catering and hospitality sector in the area.

The stakeholders included large hotels / event providers, small / boutique hotels, gastro pubs, training providers, a Further Education college, and members of the Vale of Usk Agri Urban Group. A full list of the organisations interviewed can be found in Appendix 4. A focus group was also held with a small number of current catering and hospitality students at Coleg Gwent. The findings of the stakeholder interviews and focus group are documented where relevant to sections of Chapter 4 of this report and can be identified as comments from ‘stakeholder’ or ‘commentators’ etc. in the text and can be differentiated from the survey, which refers to the representative sample of 100, and is clearly sourced (at the bottom of each figure / table), or referred to as ‘survey’ or ‘respondents’.

## 4 Research Findings

This chapter aims to address the research questions by drawing on the evidence collected through the fieldwork carried out as described in the preceding chapter. It comprises the following sub-sections:

- The Key Findings – a collection of the report’s key findings under the main headings as noted below.
- The Current Situation - an analysis of the catering and hospitality industry in the Vale of Usk for the following:
  - Perceptions of the Vale of Usk & Current Career Paths
  - Size of the Industry
  - Skills Needs and Gaps
  - Existing Provision
  - Recruitment
- The Future – an analysis of the following:
  - Future Employment Needs and Growth Expectations
  - The Need for an Education Establishment

### 4.1 Key Findings

#### 4.1.1 Industry Perceptions & Career Paths

1. Survey respondents highly rated all aspects of the hospitality sector in the Vale of Usk
2. The Vale of Usk’s festivals – specifically the Abergavenny Food Festival, was the highest ranked aspect of the industry in the Vale of Usk among survey respondents.
3. In general, survey respondents from outside the Vale of Usk rated the area lower than those from within the region. This suggests a need for more external awareness raising of what the Vale of Usk has to offer, or some self-reflection within the area about the reality of what it has to offer.
4. Stakeholders also commented positively about Monmouthshire as Food Capital of Wales – noting its food heritage, produce, scenery, and the Abergavenny Food Festival as particularly strong points.
5. Three quarters of organisations interviewed during the telephone survey agreed with the statement that young people had an unfavourable perception of a career in catering and hospitality.
6. Demands of the job and a lack of work ethic of new entrants were cited as the main reasons for poor perceptions
7. Only those who fully understand the sector and who are committed to a career that remain in the industry and are able to progress.

8. There is a need to build awareness and to instil a desire within young people to choose catering as a career choice, rather than seeing it simply as 'just a job'
9. Three quarters of the survey sample sourced 'some' food and drink from the Vale of Usk, rising to 86 per cent for those located within the area.

#### 4.1.2 Size of the Industry

10. 210 enterprises employ approximately 4,500 people in the Vale of Usk catering and hospitality industry. Approximately 718 (16%) of these are chefs or cooks.
11. The proportion of people employed in the catering and hospitality sector in the Vale of Usk as a share of all employment, is greater than that of the rest of Wales and Great Britain. It is therefore an important employment sector for the region.
12. There are more part-time workers than full-time workers in the sector and most of the work is at the lowest skill level (54% at the lowest occupation level).
13. Hotels account for largest share of employment in the sector (44%)
14. The data suggests that licensed restaurants in the Vale of Usk are smaller on average (employ fewer people) than restaurants across Wales and Great Britain as a whole.

#### 4.1.3 Skills Needs and Gaps

15. Skills gaps / expertise are more prevalent among new recruits rather than existing employees
16. Most skills gaps are linked to the underlying issue among new (younger) industry entrants' poor perceptions of the industry
17. One in ten respondents suggesting that work ethic, attitude and enthusiasm were attributes lacking among younger members of staff
18. Executive (head) chefs are the hardest vacancies to fill largely because of a lack of chefs on the market.
19. Many hotels and restaurants in the area currently have vacancies for chefs and particularly executive chefs.
20. There is a need to firstly improve perceptions of the industry as a career, and secondly, to develop new staff by giving them the experience they need to address skills shortages – namely executive chefs.

#### 4.1.4 Existing Provision

21. In the 2015/16 academic year 825 students enrolled on a catering and hospitality related course at Coleg Gwent – the primary suppliers of public-funded FE provision in the Vale of Usk.
22. The data suggests that there is a sufficient level of FE and WBL provision in South East Wales to meet the recruitment needs of the Vale of Usk at the lower end of the skills spectrum.
23. In general, catering and hospitality provision covers a skills spectrum from Level 1 (entry level skills) of the CQFW, to Level 4.

24. There are also accredited courses offered by private training providers such as a BTEC Apprenticeship in Craft Cuisine; a practical and theory-based course for professional chefs.<sup>16</sup>
25. 93 per cent of businesses train in-house, peer to peer. Only one in five uses external providers for in-house training and only one in ten uses a local college.
26. 96 per cent are satisfied with the current level of training provision – however, skills gaps are prevalent among new employees, linked to attitudes and general ability.
27. Coleg Gwent provision is primarily full-time / part-time, classroom based. Thus, suggesting a gap for informal training considering the preference of on-the-job training in the sector.

#### 4.1.5 Recruitment

28. Word of mouth and recruitment agencies are the primary methods for finding staff
29. Social media and the ‘chef grapevine’ were cited as particularly useful for some, although industry publications are also used.
30. A high number of poor quality applicants for lower level occupations was frequently mentioned as an issue for many organisations, especially smaller companies.
31. Staffing and recruitment challenges persist – specifically recruiting those with serious interest

#### 4.1.6 Future Employment Needs and Growth Expectations

32. One in five (22 per cent) of surveyed businesses plan to expand
33. Primary growth plans are to expand existing site
34. Challenging times (economically and culturally) – the restaurant food culture is undergoing change
35. Survey respondents feel the Vale of Usk needs more advertising, marketing & publicity of the food offering in the area

#### 4.1.7 The Need for an Education Establishment

36. The findings of the business survey were conclusive in their support for either a new catering establishment (56 per cent) or a virtual academy (20%)
37. Only 22 per cent indicated a preference to continue with the existing training offer
38. 93 per cent of those interested in becoming part of a network were prepared to offer training or mentoring to other businesses.
39. A training facility offering a combination of on-site and bespoke academy / apprenticeship style training appears to most effectively meet industry need.

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<sup>16</sup> <http://aaawards.org.uk/btec-l2-and-l3-apprenticeship>

## 4.2 Industry Perceptions & Career Paths

### Research Question:

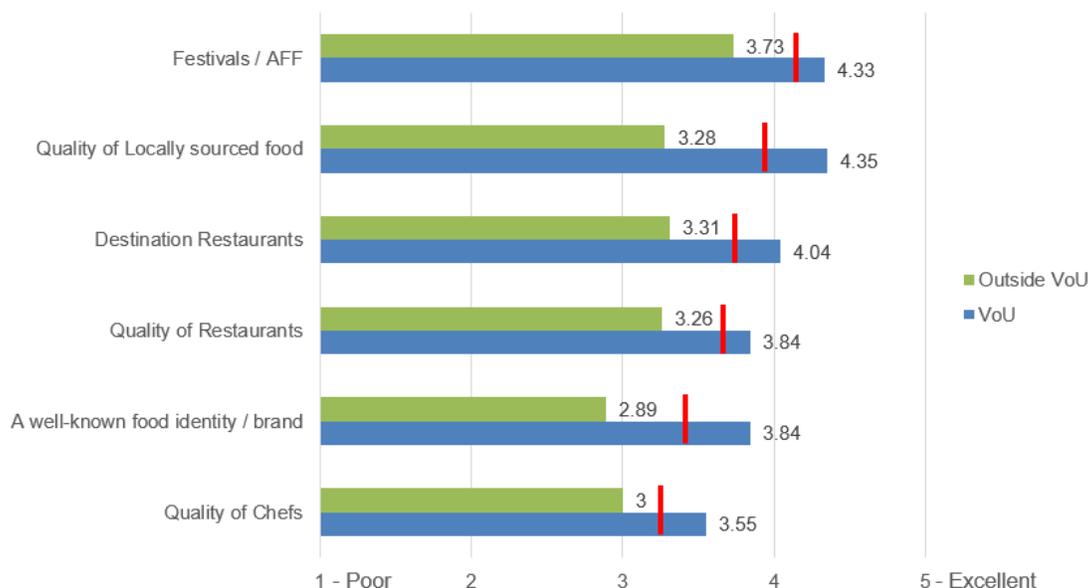
- What are the preferred career routes and aspirations of potential students?

### Key Findings:

1. Survey respondents highly rated all aspects of the hospitality sector in the Vale of Usk
2. The Vale of Usk's festivals – specifically the Abergavenny Food Festival, was the highest ranked aspect of the industry in the Vale of Usk among survey respondents.
3. In general, survey respondents from outside the Vale of Usk rated the area lower than those from within the region. This suggests a need for more external awareness raising of what the Vale of Usk has to offer, or some self-reflection within the area about the reality of what it has to offer.
4. Stakeholders also commented positively about Monmouthshire as Food Capital of Wales – noting its food heritage, produce, scenery, and the Abergavenny Food Festival as particularly strong points.
5. Three quarters of organisations interviewed during the telephone survey agreed with the statement that young people had an unfavourable perception of a career in catering and hospitality.
6. Demands of the job and a lack of work ethic of new entrants were cited as the main reasons for poor perceptions
7. Only those who fully understand the sector and who are committed to a career that remain in the industry and are able to progress.
8. There is a need to build awareness and to instil a desire within young people to choose catering as a career choice, rather than seeing it simply as 'just a job'
9. Three quarters of the survey sample sourced 'some' food and drink from the Vale of Usk, rising to 86 per cent for those located within the area.

### 4.2.1 Perceptions of the Vale of Usk

Figure 1 Perceptions of the Vale of Usk on a Five Point Scale (1 is Poor, 5 is Excellent)



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q1b, Base = 100

Survey respondents rated the catering and hospitality industry in the Vale of Usk highly for all aspects prompted during the survey (Figure 1). All aspects had an average rating greater than three on a five-point scale where one was poor and five excellent (average scores marked by red line). Similarly, discussions with stakeholders revealed that many felt the Vale of Usk has a number of inherent strengths which could underpin its position as the Food Capital of Wales. Employers and business owners based in the area were very positive about the potential of the Vale of Usk; noting that the area is renowned for its food heritage, history of producing good food and position as a ‘food-rich area’.

The survey findings provide supporting evidence to substantiate their sentiments, with high average ratings for the quality of locally sourced food (3.96 on a 5-point scale), destination restaurants (3.77), quality of restaurants (3.60) and having a well-known food identity / brand (3.42). In qualitative interviews, stakeholders reiterated their praise of the area as a whole, as one that has a “*sub-structure of people who are interested in food*”.

Stakeholders suggested that this is partially due to the ‘radiation’ of talent and good chefs that has occurred from London, the fact that the area hosts the Abergavenny Food Festival - the “*best food festival in Wales*” and the perception that there are, “*pockets of food excellence in the area.*” The survey results show that the Abergavenny Food Festival is a particular strength of the region, with businesses from outside the Vale of Usk area giving it the highest rating (3.73) of all pre-prompted aspects.

Of note, businesses located within the Vale of Usk rated all aspects of the sector higher on average than those businesses located outside the Vale of Usk. This suggests that external

perceptions of the Vale of Usk are less strong than amongst those located in the region. In support of this suggestion, the survey findings showed that more than a quarter of respondents (28 per cent) felt that more advertising / marketing or publicity of the food offering in the area would help to strengthen the industry.

Finally, the participants highlighted that the Vale of Usk is an area of natural beauty and that *“the Usk valley is blessed with its own micro-climate.”* Furthermore, one stakeholder stressed the importance of the quality of life in an area as an attraction for people to work there. For example, one commented that although the pressures of working in the kitchen remain the same, *“at least you have a nice view out of the window rather than being stuck in a basement all day.”*

#### 4.2.2 Current Career Perceptions

Approximately three quarters (73 per cent) of organisations interviewed during the telephone survey agreed with the statement that young people had an unfavourable perception of a career in catering and hospitality (Figure 2). Only 16 per cent of organisations disagreed with this statement. Potential reasons for the negative perception of the industry included the demands of the job / hard work / lack of work ethic in young people (30 per cent), long, unsociable hours (22 per cent), and that young people do not know how hard it is / what they are getting into (21 per cent). Just under a quarter of organisations (21 per cent) also believed that young people saw the sector as a stop-gap – i.e. that they did not intend to pursue a career in catering and hospitality – possibly because they felt there is no progression and also because they preferred other career options. Businesses engaged through the qualitative interviews generally agreed; citing long hours, lack of progression and irregular work as potential barriers to working in the sector. These sentiments persist despite the recent increase in the profile of the industry arising from significant television coverage of the top-end of the sector. However, this in turn has created its own problem – as many people enter the industry expecting to achieve great things immediately but quickly realise the work is difficult and progression can be slow. It is therefore only those who fully understand the sector and who are committed to a career that remain in the industry and are able to progress.

Further exploration of this issue in the in-depth interviews revealed that general perceptions of hospitality and catering as a shifting, impermanent employment sector with significant staff turnover are commonplace – although this is not true everywhere. Although lower-skilled positions such as waiters and kitchen porters are *not* seen as the beginning of a career but as a job while waiting for something else – there are positions at the opposite end of the skills spectrum, such as maître d’hotel or sous-chef and above which are definitely considered as a career.

It is common for chefs to amass experience by switching employers every two to three years, quite often with a long-term view to opening their own restaurant. It is the steps along this journey that are particularly important for this research. Clearly, at present there is a lack of a recognised career path within individual businesses. Rather, it is largely up to individuals to carve their own career. This approach places a significant cost on employers, who have to bear the brunt of the loss of time upskilling, with a real threat that staff will leave or be poached by rival organisations. This perhaps provides part of the reason why businesses are keen to pursue

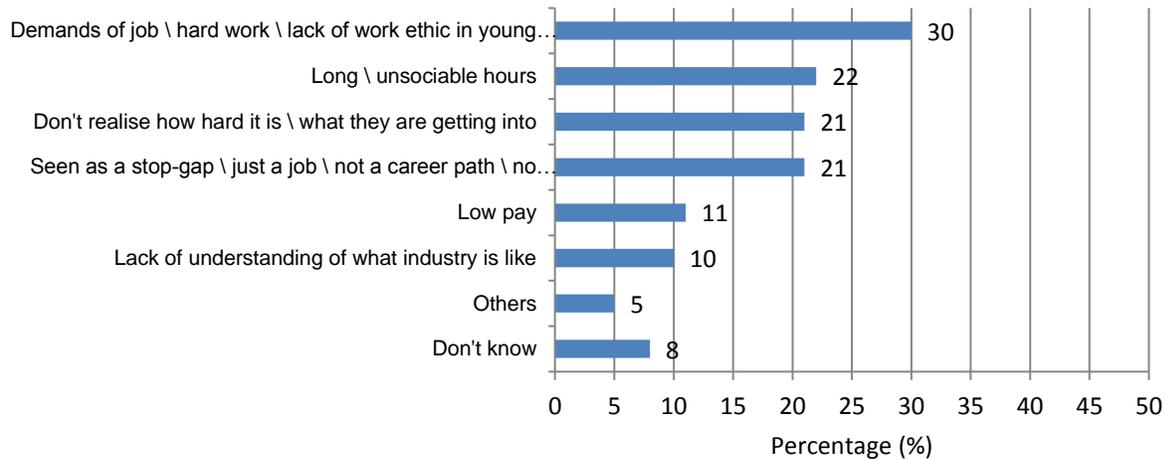
the idea of a shared training scheme, where the costs of training are spread across participating organisations rather than individual businesses (see Section 4.2.2).

Of note, one in ten (11 per cent) organisations involved in the survey referenced low pay as a potential barrier to entering the sector. This observation was also highlighted during the qualitative interviews, where individuals referenced young people having perceptions of low pay or reward as a common reason for not entering the sector. Yet during the focus group with college students, low-pay and reward was not mentioned as a barrier to entry – possibly reflecting the fact that they were students of catering and hospitality and so had already chosen the industry as a potential career – whereas the sentiments of businesses may reference the younger population at large.

Generally speaking, the students engaged during the Coleg Gwent focus group had very positive perceptions of the sector; they were aware of long, unsocial hours but did not see it as a problem for the beginning of their career. In contrast, they saw working in the sector as fun and rewarding. They also appreciated having time in college to learn skills in a quiet environment which allowed them to assimilate the information, understand the process and put it into practice away from the pressures of a commercial kitchen. The head of studies, as well as the students, mentioned that every week they have some kitchen production time where they prepare food served in the college restaurant. They also have a service shift, which teaches them the coordination needed in the kitchen as well as with the waiting staff.

When asked for potential solutions that would address negative industry perceptions, a sizeable 41 per cent responded that they simply didn't know (Figure 3) – which highlights the difficulties the industry faces addressing this barrier. Of the potential methods that were put forward, over half were linked to a need for more effective education to better prepare people for the challenges of the industry. Specifically, the most commonly referenced methods were; courses and education preparing people for the industry (19 per cent), preparing young people for the world of work and giving them real life experience (12 per cent) and educating them about the chance to progress and have a rewarding career (10 per cent). Clearly, there is an opportunity for an education establishment such as that proposed in this report to address these perceptions by utilising the skills and expertise of those currently involved in the sector to impart their passion and knowledge onto the next generation. This includes chefs, schools, colleges and at home. The presence of a catering academy producing high-level skills and career opportunities could help to address these inherent poor industry perceptions. See recommendations for further discussion.

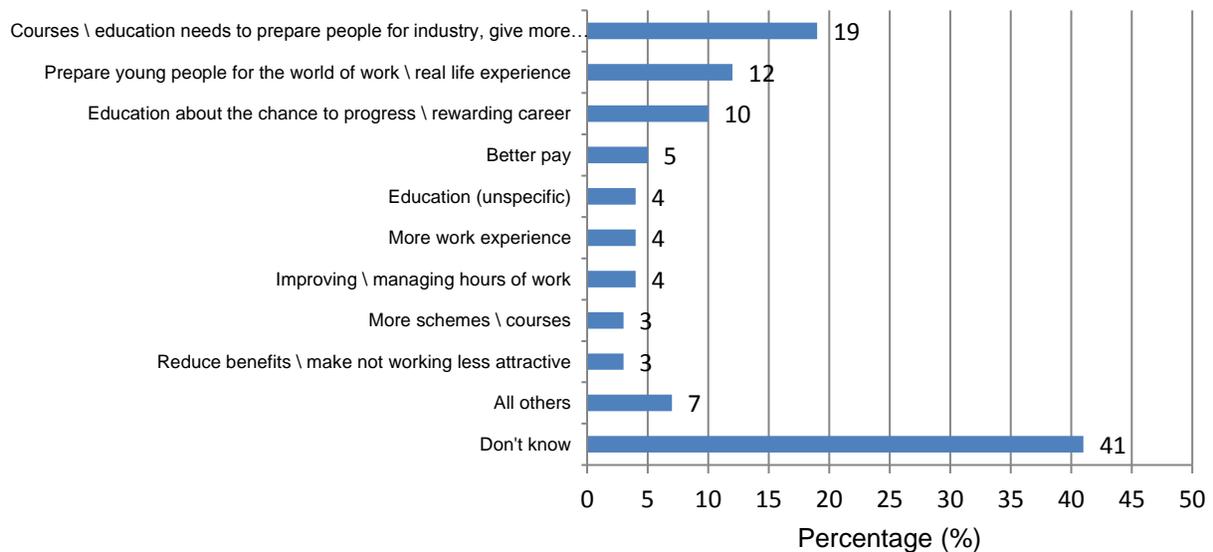
Figure 2 Potential reasons why young people may have an unfavourable perception of a career in catering and hospitality



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q22, Base = 73

The responses from the qualitative interviews aligned with these suggestions. Individuals felt there was a need to build awareness and to instil a desire within young people to choose catering as a career choice, rather than seeing it simply as 'just a job'. More specifically, individuals suggested the Vale of Usk could promote itself as an area of natural beauty with good state schools, perhaps aimed more at families and those already established within the sector e.g. high-end chefs, than young people or those just beginning a career in catering and hospitality.

Figure 3 Potential methods to change the negative perceptions of young people, about a career in catering and hospitality



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q23, Base = 73

### Perceptions of Future Career Opportunities: Current Students Perspective

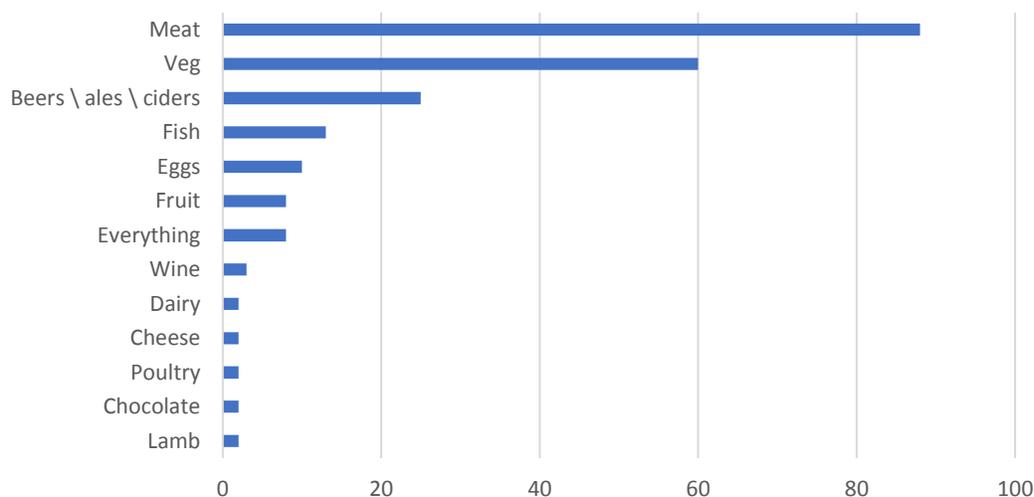
Perceptions of future career opportunities within the focus group were mixed. Most did not have a clear view and believed they would know better towards the end of their diploma (in about a year). Although few had clear plans of where they would end up working or long-term career goals, some hoped to own their own restaurant, aware that it might be very challenging. Interestingly, the group as a whole thought that they would not be faced with problems in finding employment in the industry, and considered the hospitality and catering sector to offer diverse opportunities to work; whether abroad or in the UK.

#### 4.2.3 The Extent of Local Sourcing

Three quarters of the survey sample sourced ‘some’ food and drink from the Vale of Usk, rising to 86 per cent for those located within the area.

The survey results also show that of those who do source locally (within the Vale of Usk) the average proportion<sup>17</sup> of all supplies sourced from the region was 70 per cent for those within the region, and 60 per cent for those outside. Thus, on average, a higher proportion of businesses supplies are sources from the region when the business is located in the region. For those located outside the region, a slightly smaller proportion of all supplies come from within the region – although still relatively high. Meat (88 per cent) and vegetables (60 per cent) were the main items sourced locally (Figure 4).

Figure 4 List of Food Items by the Proportion of Sample which Source Food Locally<sup>18</sup>



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q4, Base =60

<sup>17</sup> Mean of grouped data. Note that this may refer to use of local wholesalers, rather than links to producers based in the Vale of Usk.

<sup>18</sup> Categories are not mutually exclusive and are based on the wording supplied by the respondents themselves. Thus, categories like ‘meat’ may include lamb for those surveyed, however, some respondents only sourced ‘lamb’, hence it is a separate category for the purpose of the graph. It may be prudent to merge categories at the reader’s discretion.

Considering the research findings elsewhere - specifically the need to better promote the Vale of Usk's food offer externally, this high proportion of local sourcing is an opportunity that should be capitalised upon. The businesses already appear to have a high level of buy-in to local sourcing and this message now needs to be promoted externally, to both customers and the general public.

## 4.3 Size of the Industry

### Research Question(s):

- What is the size (employment and number of businesses) of the catering and hospitality industry in the Vale of Usk?

### Key Findings:

1. 210 enterprises employ approximately 4,500 people in the Vale of Usk catering and hospitality industry. Approximately 718 (16%) of these are chefs or cooks.
2. The proportion of people employed in the catering and hospitality sector in the Vale of Usk as a share of all employment, is greater than that of the rest of Wales and Great Britain. It is therefore an important employment sector for the region.
3. There are more part-time workers than full-time workers in the sector and most of the work is at the lowest skill level (54% at the lowest occupation level).
4. Hotels account for largest share of employment in the sector (44%)
5. The data suggests that licensed restaurants in the Vale of Usk are smaller on average (employ fewer people) than restaurants across Wales and Great Britain as a whole.

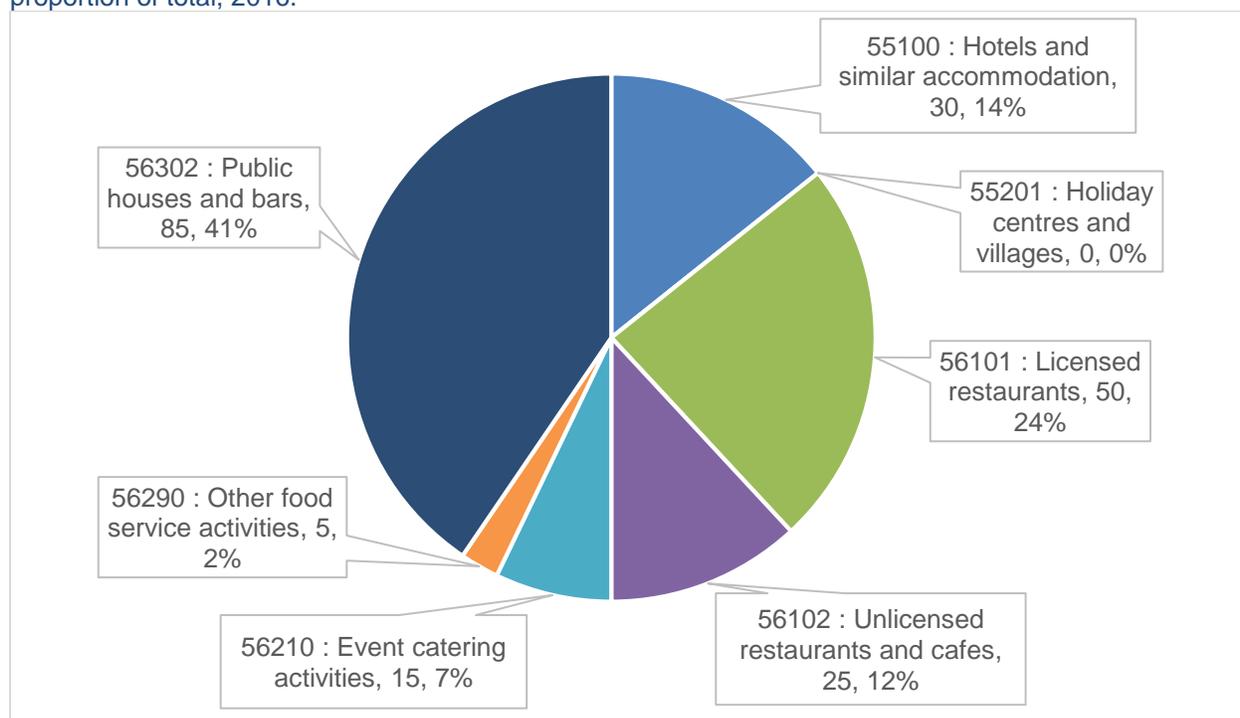
In 2015, businesses working in the catering and hospitality sector in the Vale of Usk employed a greater proportion of employees (full-time and part-time) than the sector in Wales and in Great Britain. In the Vale of Usk, the sector employed 8 per cent all employees, compared to 6 per cent in Wales and Great Britain. Businesses in the catering and hospitality sector are a particularly large employer of part-time workers, and in the Vale of Usk 13 per cent of all part-time employees worked in the sector, compared to 10 per cent in Wales and 11 per cent in Great Britain.

This section of the report presents an overview of the catering and hospitality sector in the Vale of Usk, including the number of enterprises working in it and the number of people employed by it, with comparisons made to Wales and the UK/Great Britain.

### 4.3.1 Number of Enterprises in the Catering and Hospitality Sector

In 2016, there were 210 enterprises working in the catering and hospitality sector in the Vale of Usk. The total number of enterprises in this sector has fluctuated between 2010 and 2016 – the lowest number (190 enterprises) was in 2011 and 2013, whilst the 2016 figure (210 enterprises) is the highest in this time period. Across Wales and UK, the picture is much the same, as the total number of enterprises was greatest in 2016.

Figure 5 Catering and hospitality sector enterprises in Vale of Usk: by 5-digit SIC code, count and proportion of total, 2016.



Source: ONS, UK Business Counts – Enterprises, 2016

As Figure 5 shows, the largest proportion of enterprises in the Vale of Usk in 2016 was public houses and bars (41 per cent) and licensed restaurants (24 per cent).

These two groups also make up the two largest groups both across Wales and across the UK. Public houses and bars comprised a greater proportion of enterprises in the sector in the Vale of Usk (41 per cent) than in Wales (36 per cent) and in the UK (32 per cent) in 2016. Licensed restaurants comprised a greater proportion of enterprises in the Vale of Usk (24 per cent) than across Wales (22 per cent), but a smaller proportion than in the UK (27 per cent).

Between 2010 and 2016, the number of licensed restaurants in the Vale of Usk area increased from 35 to 50 enterprises, whilst the number of public houses and bars decreased from 105 to 85 enterprises. Similar changes occurred across Wales and the UK.<sup>19</sup>

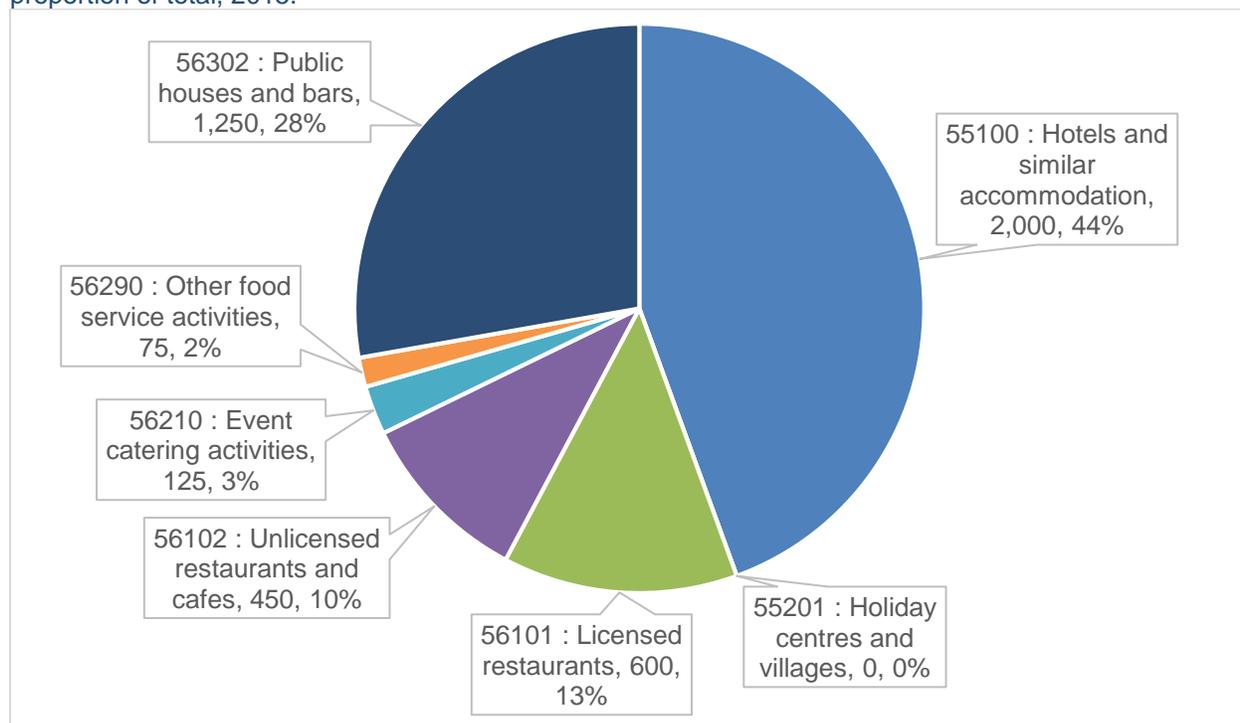
#### 4.3.2 Number of People Employed in the Catering and Hospitality Sector

In 2015, 4,500 people were employed in the catering and hospitality sector in the Vale of Usk. A majority (51.6 per cent) were employed part-time, and a minority (46.6 per cent) were employed full-time.<sup>20</sup>

<sup>19</sup> ONS, UK Business Counts – Enterprises, 2016.

<sup>20</sup> Percentages calculated from BRES. Totals do not equal 100 per cent due to rounding errors.

Figure 6 Catering and hospitality sector employees in Vale of Usk: by 5-digit SIC code, count and proportion of total, 2015.



Source: ONS Business Register and Employment Survey, 2015.

As Figure 6 shows, in 2015, the greatest proportion (44 per cent) of people in this sector in the Vale of Usk worked in hotels and similar accommodation, followed by public houses and bars (28 per cent) and licensed restaurants (13 per cent).

The proportion of people in the sector working in hotels and similar accommodation in the Vale of Usk (44 per cent) is markedly greater than across Wales (26 per cent) and in Great Britain (20 per cent); whilst the proportion of people who worked in licensed restaurants in the Vale of Usk (13 per cent) was markedly smaller than across Wales (19 per cent) and in Great Britain (24 per cent)<sup>21</sup> despite there being a larger share of licensed restaurants in the Vale of Usk compared with the rest of Wales / Great Britain. This suggests that the restaurants in the Vale of Usk on average, are smaller (employ fewer people) than restaurants on average elsewhere.

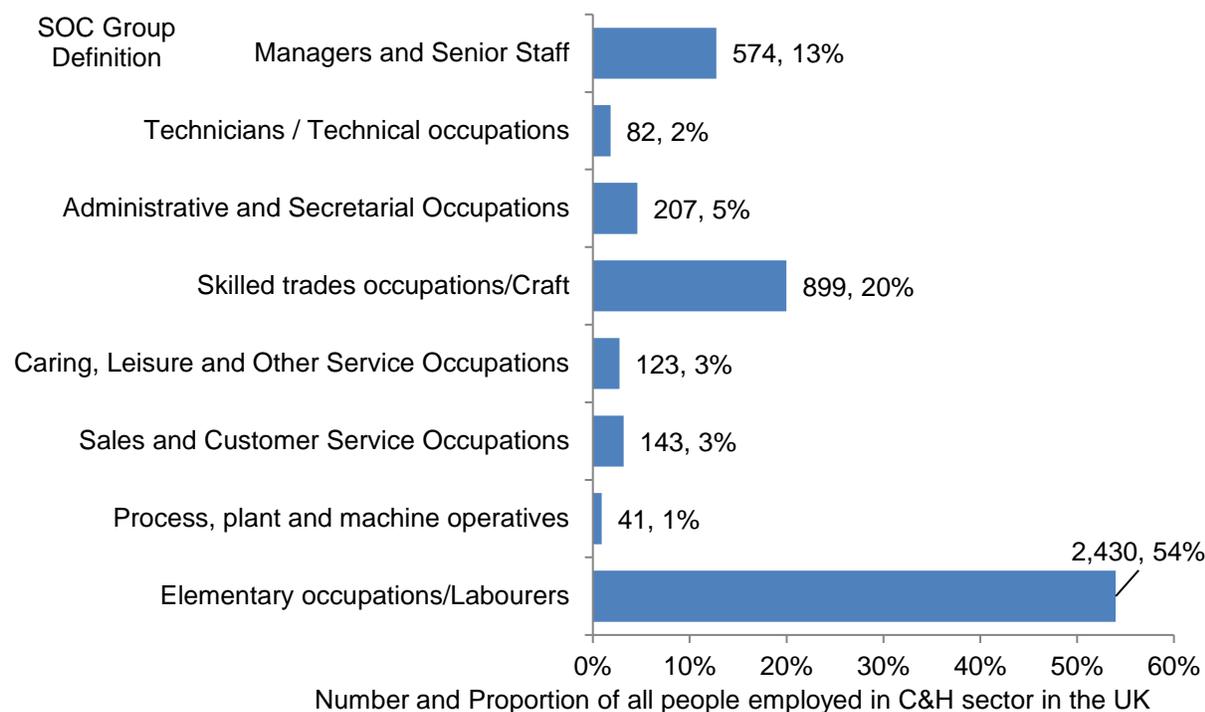
#### 4.3.3 Occupation of People Employed in the Catering and Hospitality Sector

In the UK in 2013, 54 per cent of people employed in this sector worked in a low skilled elementary occupation, which includes waiters/waitresses, bar staff, kitchen assistants, cleaners etc. Twenty per cent of people in the sector were employed in 'skilled trade occupations/craft', which includes chefs, cooks and catering managers. Of which, the majority (80 per cent) were employed as chefs and cooks (accounting for 16 per cent of all skilled trade occupations).<sup>22</sup>

<sup>21</sup> ONS, Business Register and Employment Survey, 2015.

<sup>22</sup> Figures are not available at a Vale of Usk-level, but it is reasonable to assume that the proportions will be similar to that observed across the UK as a whole.

Figure 7 People employed in the catering and hospitality sector: by SOC code group, 2013.



Source: Annual Population Survey 2013, ONS

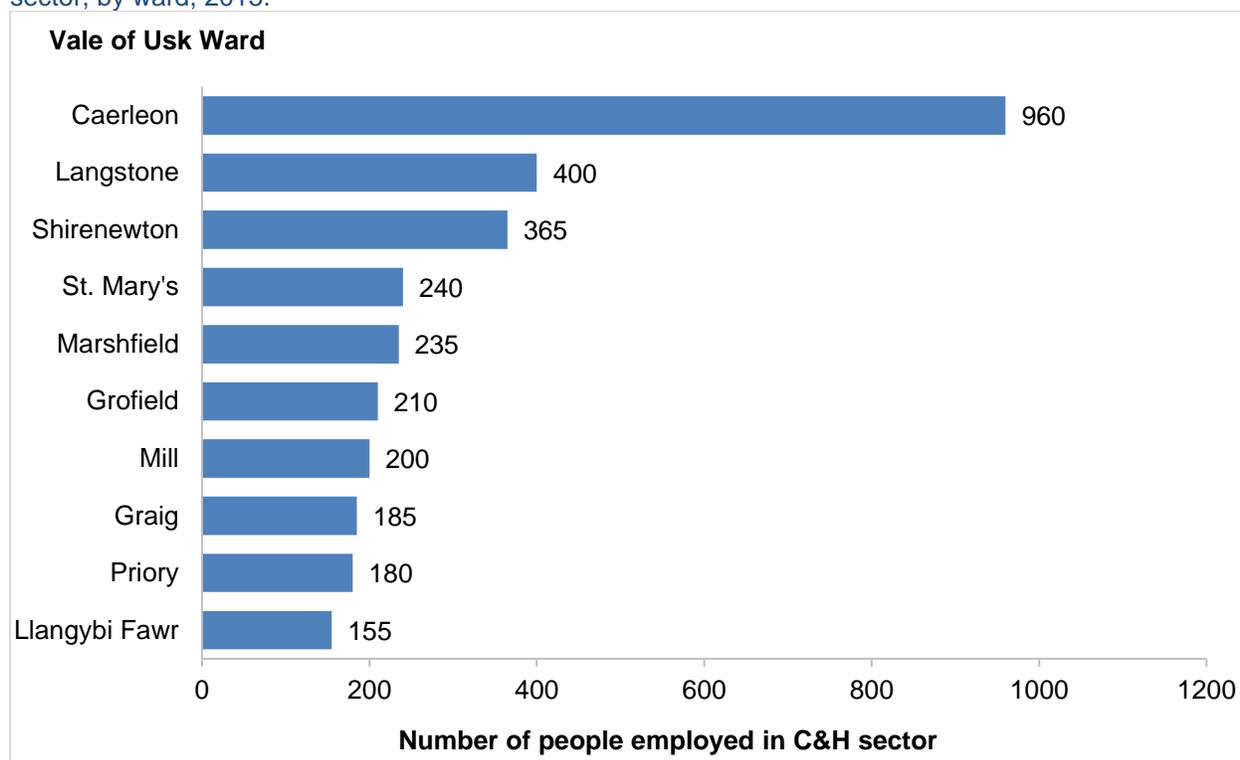
Figure 7 shows these proportions, as well as the number of people in each group employed in the Vale of Usk – based on the total number of people employed in the sector in 2016 (assuming the proportions are the same as in the UK). This analysis suggests that of the 899 people carrying out ‘skilled trades occupations’ in the Vale of Usk, approximately 718 people are employed as chefs and cooks.<sup>23</sup>

#### 4.3.4 Location of People Employed in the Catering and Hospitality Sector

Of the 47 electoral wards that make up the Vale of Usk area, just seven have no people employed in the catering and hospitality sector. Conversely, 15 wards contain more than one hundred people employed in the sector.

<sup>23</sup> ONS, Annual Population Survey, 2013.

Figure 8 Ten wards in the Vale of Usk with the most people employed in the catering and hospitality sector, by ward, 2015.



Source: ONS Business Register and Employment Survey, 2015.

Figure 8 shows the ten wards in the Vale of Usk area that employ the most people in the catering and hospitality sector. It shows that the ward of Caerleon by far employs the most people in this sector – 960 – of which 800 work in hotels and similar accommodation.

Figure 9 Vale of Usk electoral ward with most people employed: by SIC code, 2015.

SIC Code	Vale of Usk ward with most people employed (number of people)
55100 : Hotels and similar accommodation	Caerleon (800)
55201 : Holiday centres and villages	-
56101 : Licensed restaurants	Drybridge (75)
56102 : Unlicensed restaurants and cafes	Mill (150)
56210 : Event catering activities	Marshfield (50)
56290 : Other food service activities	Graig (20)
56302 : Public houses and bars	Langstone (150)

Source: ONS Business Register and Employment Survey, 2015.

Figure 9 shows the ward in the Vale of the Usk area with the most people employed in each SIC code of the catering and hospitality sector in 2015. As can be seen, Drybridge ward contained the most people in licensed restaurants, despite not featuring in the top ten wards containing people employed in the catering and hospitality sector.

## 4.4 Skills Needs and Gaps

### Research Question:

- What are the current skills needs of the sector?

### Key Findings:

1. Skills gaps / expertise are more prevalent among new recruits rather than existing employees
2. Most skills gaps are linked to the underlying issue among new (younger) industry entrants' poor perceptions of the industry
3. One in ten respondents suggesting that work ethic, attitude and enthusiasm were attributes lacking among younger members of staff
4. Executive (head) chefs are the hardest vacancies to fill largely because of a lack of chefs on the market.
5. Many hotels and restaurants in the area currently have vacancies for chefs and particularly executive chefs.
6. There is a need to firstly improve perceptions of the industry as a career, and secondly, to develop new staff by giving them the experience they need to address skills shortages – namely executive chefs.

More than half of the survey respondents identified that some skill or expertise was lacking among new recruits, but they related more to general skills and attitudes, rather than specific industry / technical skills. For example, the survey shows that the skills new recruits in the sector were lacking were general abilities (10%), real life experience (7%), enthusiasm (5%), and common sense (4%)<sup>24</sup>. Meanwhile, around four out of five (82 per cent) of businesses surveyed felt there were no skills gaps amongst their existing staff.<sup>25</sup> This data indicates that skills gaps are more prevalent among new recruits than existing employees, or that employers have relatively low expectations of their staff.

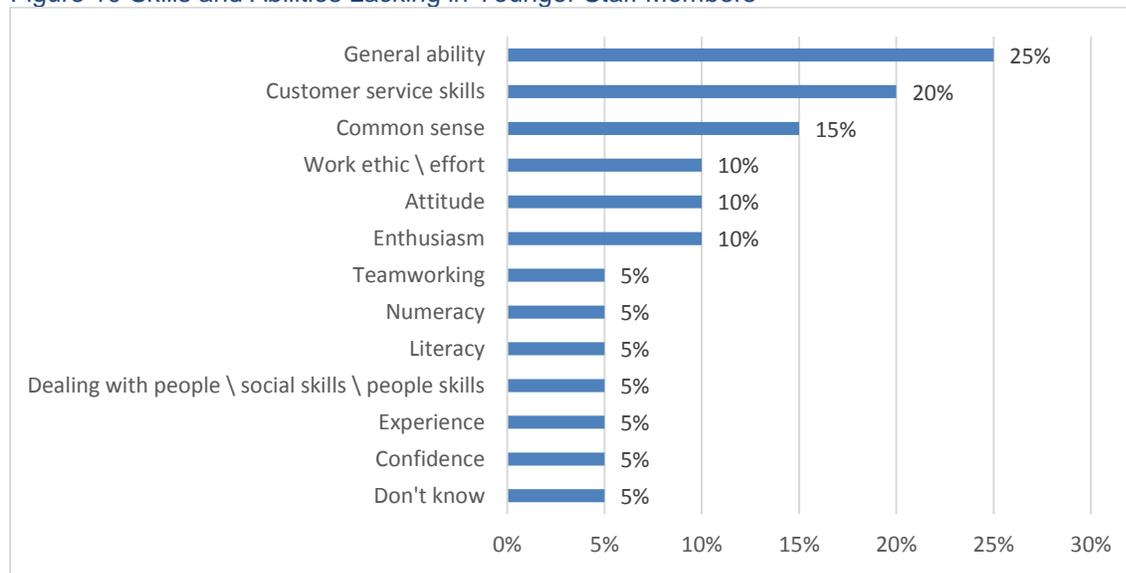
The skills that people recruited directly from school/college possess when joining an establishment were judged as good by 30 per cent of the employers (35% excellent and good) while 12 per cent rated them as average and 7 per cent poor. The skills which are lacking were perceived to be similar to those lacking among new entrants - and again are not technical skills but more general, behavioural and around work attitude and ethics (Figure 10).

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<sup>24</sup> Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q9a

<sup>25</sup> Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q9b

Figure 10 Skills and Abilities Lacking in Younger Staff Members\*



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q25, Base = 20 (those who rated the skills and abilities of younger members of staff as average, poor or very poor)

\*Specifically those recruited directly from school / college.

The reason why these skills are lacking is allied to a recurring theme throughout the research. Key industry employers engaged during the research suggested it was largely their attitude to work - which in turn was thought to be the result of many not considering the job as a profession but as a stop-gap before doing something else (see Chapter 4.1.6) – which was causing skills gaps. Moreover, businesses engaged during the research expressed frustration at the lack of understanding of the need for good hospitality skills among their staff – particularly new recruits.

To further shed light on these findings, there was a belief among businesses interviewed that students coming from college who have been trained and taught by professionals should have more of the general technical skills required. It was acknowledged, however, that in many cases, attitude, work ethic, and team working attributes only came through experience.

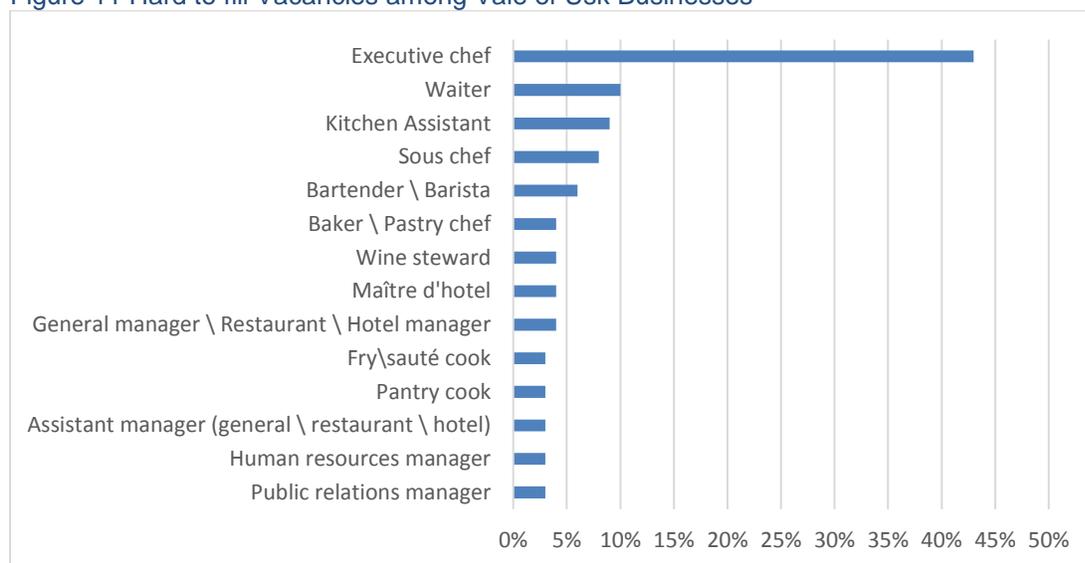
The survey findings provided some limited evidence to support this sentiment, with one in ten respondents suggesting that work ethic, attitude and enthusiasm were attributes lacking among younger members of staff (specifically those recruited directly from school / college) (Figure 10).

Clearly therefore, there is a need to firstly improve perceptions of the industry as a career, and secondly, to develop new staff by giving them the experience they need.

Two out of five (43 per cent) businesses surveyed identified that executive chefs are the hardest occupations to fill (Figure 11) largely because of a general shortage of chefs on the market. (22% of responses). Furthermore, from the qualitative interviews, it was apparent that numerous hotels and restaurants in the area have vacancies for chefs and particularly executive chefs. This research suggests therefore, that the development of skills within the current labour force, is not producing the necessary talent to meet industry need. This identifies a potential gap in skills provision, which could be addressed through an education establishment, providing the

skills required (specific / bespoke) delivered in a way which meets industry need (i.e. on-the-job training).

Figure 11 Hard to fill Vacancies among Vale of Usk Businesses



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q7, Base =100

The research also hints that the location of establishments in the Vale of Usk may inhibit their ability to attract talent. One in five (20 per cent) respondents suggested that the location, and being difficult to get to, was part of the reason some vacancies were hard to fill. Some country pubs and fine dining restaurants are located in remote places where public transport does not go, rendering them inaccessible to people without access to transport. Long, unsociable hours and low pay also play a part in recruitment difficulties, but they are not seen as the main reasons why some positions are harder to fill than others.

Finally, one commentator noted that the largest challenge of the sector is finding people to come and work in the industry. *“The biggest problem is not the lack of skills or expertise it is the lack of people. Nobody is coming into the industry.”*

## 4.5 Existing Provision

### Research Question:

- What is the current level of further and higher education provision in the sector?

### Key Findings:

1. In the 2015/16 academic year 825 students enrolled on a catering and hospitality related course at Coleg Gwent – the primary suppliers of public-funded FE provision in the Vale of Usk.
2. The data suggests that there is a sufficient level of FE and WBL provision in South East Wales to meet the recruitment needs of the Vale of Usk at the lower end of the skills spectrum.
3. In general, catering and hospitality provision covers a skills spectrum from Level 1 (entry level skills) of the CQFW, to Level 4.
4. There are also accredited courses offered by private training providers such as a BTEC Apprenticeship in Craft Cuisine; a practical and theory-based course for professional chefs.<sup>26</sup>
5. 93 per cent of businesses train in-house, peer to peer. Only one in five uses external providers for in-house training and only one in ten uses a local college.
6. 96 per cent are satisfied with the current level of training provision – however, skills gaps are prevalent among new employees, linked to attitudes and general ability.
7. Coleg Gwent provision is primarily full-time / part-time, classroom based. Thus, suggesting a gap for informal training considering the preference of on-the-job training in the sector.

This analysis draws on national datasets to understand the level of catering and hospitality related courses that are available in the study region. For the purpose of this section of the analysis, the study area is extended from the Vale of Usk to neighbouring authorities and Cardiff, to include provision that can be accessed by those living and working in the Vale of Usk.

Learning provision data is publicly available when public funds have been used (in part or wholly) to deliver training. It is not possible to map privately procured training provision using existing datasets, primarily due to the commercial sensitivity of the information. The Lifelong Learning Wales Record (LLWR) is the official dataset for all publicly funded training provision in Wales.

Table 2 Numbers of Learners pursuing at least one Hospitality and Catering Learning Activity by Provider and Local Authority of Domicile, 2015/16

Provider	Blaenau Gwent	Torfaen	Monmouthshire	Newport	Cardiff	Grand Total
Pembrokeshire	0	0	0	0	0	95
Swansea	0	0	0	0	0	75
Neath Port Talbot	0	0	0	0	0	30

<sup>26</sup> <http://aaawards.org.uk/btec-l2-and-l3-apprenticeship>

The Vale of Glamorgan	0	0	0	0	*	<b>80</b>
Caerphilly	*	*	0	*	5	<b>270</b>
Newport	0	*	0	15	0	<b>15</b>
Cardiff	0	0	0	0	405	<b>410</b>
Bridgend College	0	0	0	0	*	<b>145</b>
Coleg Sir Gar	0	0	0	0	0	<b>115</b>
Coleg Ceredigion	0	0	0	0	0	<b>125</b>
Coleg Gwent	210	190	105	160	10	<b>825</b>
Grwp Llandrillo Menai	0	0	0	0	*	<b>1,675</b>
Pembrokeshire College	0	0	0	0	0	<b>275</b>
Gower College Swansea	*	0	0	25	0	<b>325</b>
Cardiff and Vale College	0	0	*	*	110	<b>160</b>
Coleg Cambria	0	0	0	0	0	<b>790</b>
Coleg y Cymoedd	*	0	*	10	15	<b>275</b>
Grwp NPTC Group	0	*	*	0	0	<b>290</b>
Adult Learning Wales	120	120	15	145	50	<b>1,365</b>
OTP - Other training provider	25	65	115	115	310	<b>1,805</b>
<b>Grand Total</b>	<b>360</b>	<b>380</b>	<b>235</b>	<b>475</b>	<b>915</b>	<b>9,145</b>

Source: LLWR academic year 2015/2016- (31/05/2017)<sup>27</sup>

In the area shown, there are nine organisations providing (publicly funded) catering and hospitality courses, which includes Further Education Institutes (FEIs) and some private training providers (Figure 13).<sup>28</sup> Only Coleg Gwent is located in the Vale of Usk area, offering full-time, part-time and on the job courses (Table 2).

According to the LLWR, for the academic year 2015/2016 here were 9,145 learners studying hospitality and catering learning activities in Wales (all mode of learning included). Around 1,400 were studying part-time in South East Wales in a college setting (an additional 1,365 learners were studying part-time with Adult Learning Wales<sup>29</sup>). During the 2015/16 academic year there were 825 learners studying a catering and hospitality related courses at Coleg Gwent. Considering that the total employment in the Vale of Usk catering and hospitality sector is estimated at around 4,500 people<sup>30</sup> this data suggests that there is a sufficient supply of FE and WBL students to meet the demand for new entrants. For example, if all establishments (210) required just one additional staff member per year on average, the requirement could be provided almost four times over from the students of Coleg Gwent alone (825 current students divided by 210 new entrants). Including all college setting students in the wider South-East Wales region (1,400) clearly shows that the Vale of Usk region is well supplied with potential new entrants.

<sup>27</sup> Figures have all been rounded to the nearest multiple of 5. Non-zero values less than 5 have been suppressed and are denoted by an asterisk.

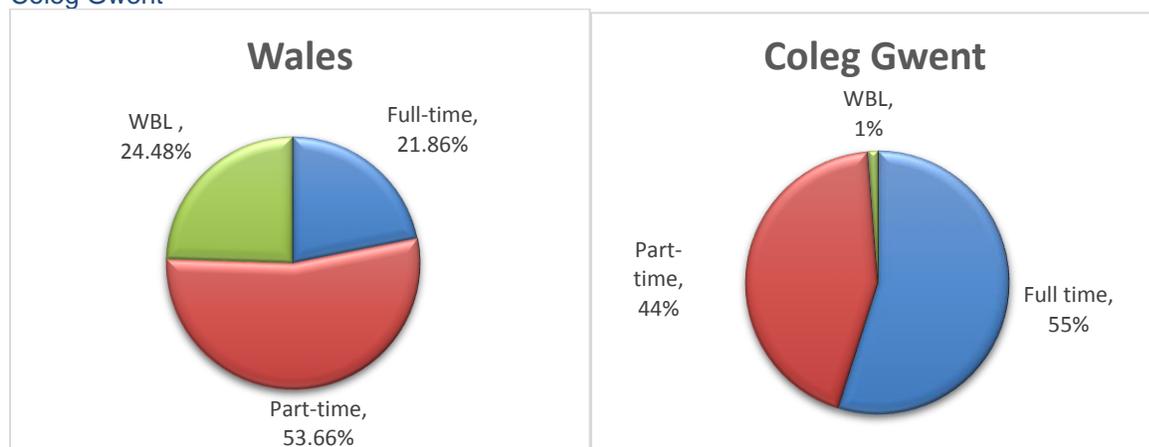
<sup>28</sup> Private companies include ACT training, ITEC and talk training offer traineeships, apprenticeships as well as higher apprenticeships via the Apprenticeship, Traineeship and Jobs Growth Wales Programmes, led by the Welsh Government, are supported by the European Social Fund.

<sup>29</sup> <http://www.adultlearning.wales/>

<sup>30</sup> See section 4.3.2 Number of People Employed in the Catering and Hospitality Sector.

Full-time courses tend to attract a younger population. For example, in Coleg Gwent there is a range from 16 to 25 years old taking the Professional Cookery courses (level 1 and 2).

Figure 12 Split between Modes of Learning for Catering and Hospitality Courses in Wales and Coleg Gwent



Source: Lifelong Learning Wales Record (LLWR) - May 2017

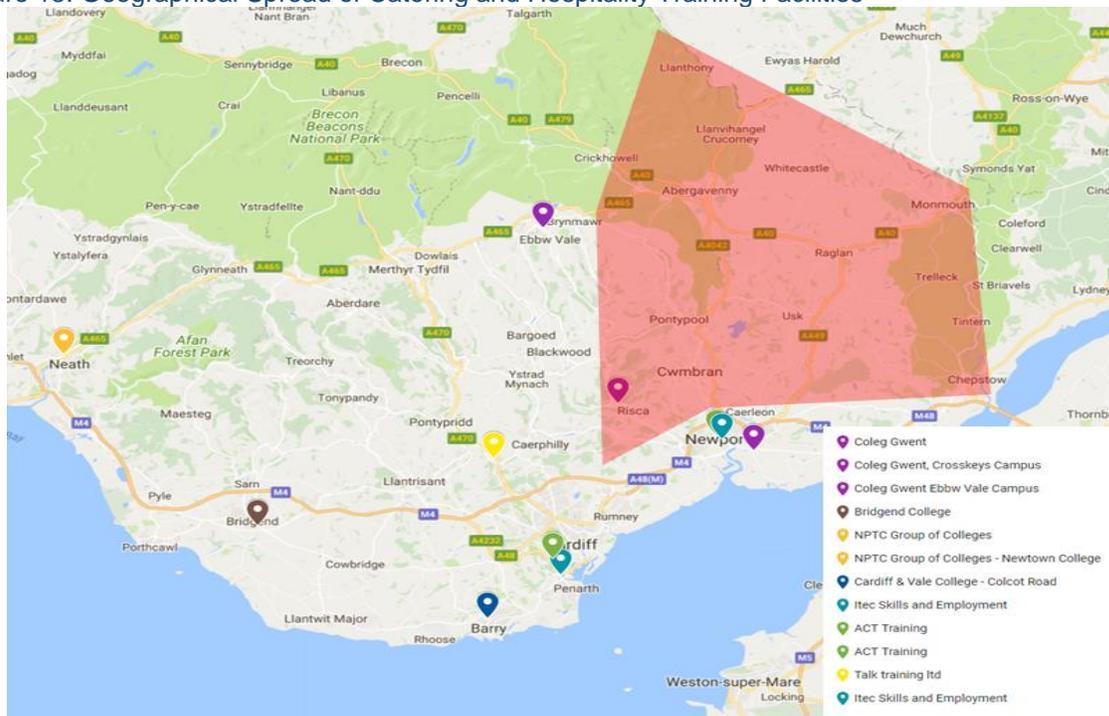
Figure 12 shows that a notable difference between the mode of study at Coleg Gwent, compared with the average across all publicly funded provision in Wales. There is a much larger proportion of full-time, and part-time courses at Coleg Gwent, with far fewer work-based learning incidences. This suggests that the catering and hospitality offer at the College is better suited to more traditional, classroom based training – which may highlight a potential gap in provision for the catering and hospitality sector in the Vale of Usk, considering the preference for on-the-job training in the sector (see Chapter 4.4.1).

Those studying at Coleg Gwent mainly travel from Blaenau Gwent, Torfaen, Newport and Caerphilly. The domicile location of students studying at the various organisations reflects the college location, which suggests that learners do not travel far to attend college. This could be because each college offers a comprehensive range of courses.

In general, catering and hospitality provision covers a skills spectrum from Level 1 (entry level skills) of the CQFW, to Level 4. This includes foundation degrees (typically Level 4), VRQ, NVQ, HND (typically Levels 2-3, but some 4-5) and apprenticeships (typically Levels 1-3). Coleg Gwent only offers a Diploma in Professional Cookery at Level 1-2 and a BTEC in the travel and tourism industry (Level 1 Diploma introduction and Level 2-3 BTEC)

More specialised courses such as the Diploma in Professional Cooking and Food Service, Diploma in Food Industry Skills (bakery), VRQ Patisserie and the Professional Culinary Arts Management foundation degree (Level 4) are taught in South Wales either in colleges (NPTC group of colleges and Cardiff and Vale college) or by training providers.

Figure 13: Geographical Spread of Catering and Hospitality Training Facilities



Source: Miller Research (May 2017), presented using Google maps. Approximate location of the Vale of Usk area highlighted in Red

People 1st, the Sector Skills Council for the Hospitality, Leisure, Travel and Tourism Sector is involved in the design of aspects of the curriculum. They advise colleges and other training providers on industry needs, ensuring alignment with new policies; and also writing qualifications. They are able to shape the development of the curriculum to address skill gaps by supporting colleges to introduce new courses (administratively and financially). Furthermore, all colleges meet three times a year to ensure that their offer is in line with what the industry need and to discuss the content of the curriculum (for the catering and hospitality courses).

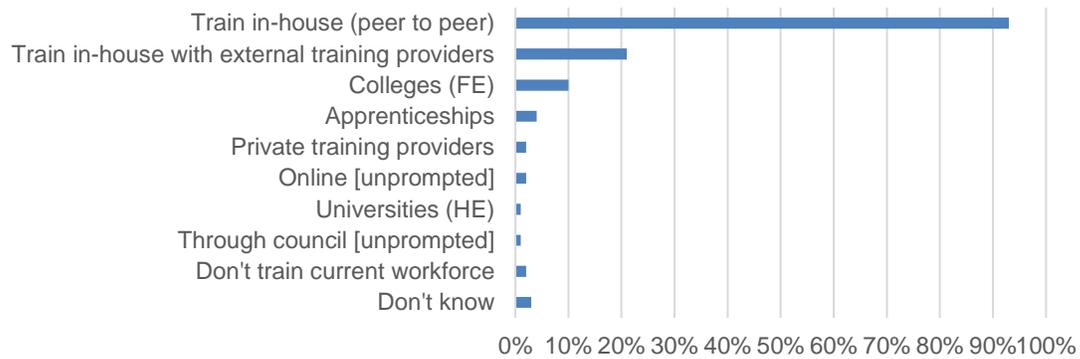
#### 4.5.1 How Vale of Usk Catering & Hospitality Businesses Currently Train their Staff

In-house (peer to peer) training was used by 93 per cent of survey respondents (Figure 14) and only one in five (21 per cent) businesses drew on the expertise of an external training provider to deliver their in-house training. One in ten (10 per cent) used a local college and in total, two thirds (67 per cent) of the sample did not use any training providers.<sup>31</sup> Importantly for this study, 96 per cent of the sample indicated that they felt that existing skills and training provision adequately met their needs.<sup>32</sup> Clearly, the sector is heavily dependent on unaccredited peer to peer training delivered in-house, and this approach is currently meeting their perceived needs.

<sup>31</sup> Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q11, Base = 100.

<sup>32</sup> Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q12, Base = 100.

Figure 14 Current Approaches to Training



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q10, Base = 100

These survey findings were supported by the sentiments of the businesses engaged through in-depth interviews. Businesses noted that in general, new recruits tend to be provided with the necessary statutory training, such as health and safety, if they have not already acquired qualifications from college education – and then informal on-the-job training is provided to upskill as required; however, overall, formal training is not seen as a priority, with most organisations preferring to provide in-house, bespoke training as necessary to progress their staff.

Table 3 Current Further Education and Higher Education Courses in Catering and Hospitality Related Courses in South East Wales (2015/16)

Level	Qualification	Course	Course Content			Providers	Learning Progression	Career Path: Expected Occupation
Level 1	Diploma	Professional Cookery	Health and safety	Contemporary cooking techniques: stocks, soups and sauces, fruit and vegetables, meat and offal, poultry, fish and shellfish, rice, pasta, grains and egg dishes as well as hot and cold deserts and puddings and bakery products.		Coleg Gwent	Level 3 Professional Cookery Diploma Patisserie and Confectionary NVQ	Chef / Cook / Catering Manager / Restaurant Manager
Level 1-2	Diploma	Hospitality (NVQ) Part-time	Health and safety, maintain hygienic and secure environment Give customers a positive impression of self and the organisation Work effectively as part of a hospitality team			Cardiff and Vale college	QCF (NVQ ) Diploma in Hospitality Supervision and Leadership Level 3	Front of house, reception, housekeeping and food and beverage service also most customer facing roles in the hospitality industry.
Level 1-2	Certificate	Food studies entry	Health and safety	Select and use basic kitchen equipment, identify main food group	Prepare food, cook food and clean work areas and equipment	Bridgend College	Progress to Entry to Certificate in Food Studies	Kitchen assistant
Level 2	Diploma	Food Beverage and professional cookery studies	Health and safety, legislation in food and beverage service	Preparation and cooking of meat, offal, fish, poultry, shellfish, fruit and vegetables	Principles of customer service in hospitality, leisure, travel and tourism; delivery of good customer service, food service	Bridgend College	VTCT Level 3 Diploma in Food and Beverage Service Supervision	Front of house staff and chefs in a restaurant, café, coffee shop, public house, bar, cruise liner or hotel.

Level	Qualification	Course	Course Content			Providers	Learning Progression	Career Path: Expected Occupation
Level 2	Diploma	Professional Cookery and food service	Healthy food and special diets, costing, fish cookery, meat cookery, doughs, soups and pastry, food service, menu writing, bar work.			NPTC group of colleges Cardiff and Vale college	Professional Cookery VRQ or NVQ, Professional Patisserie & Confectionary (VRQ), Diploma In Food & Beverage Service Supervision (NVQ)	Catering or restaurant manager Chef
Level 3	Diploma	Professional Cooking	Maintain food safety when storing, preparing and cooking food	Develop productive working relationships with colleagues	Prepare, cook and finish complex recipe	NPTC group of colleges	Level 3 Award in Hospitality Supervision and Leadership Principles Level 3 Diploma in Hospitality Supervision and Leadership	Head Chefs, Sous Chefs
Level 3	Diploma	Hospitality supervision (part-time)	Maintain the health, hygiene, safety and security of the working environment.	Lead a team to improve customer service Develop productive working relationships with colleagues	Provide leadership for your team Contribute to the control of resources	NPTC group of colleges Cardiff and Vale college	Level 3 Diploma in Advanced Professional Cookery Foundation and hospitality degree programmes.	Front of house, reception, customer facing role at supervisory level
Level 3	Diploma	VRQ Advanced Bakery, Patisserie & Confectionary Skills (part -time)	All the knowledge, techniques and artistic skills required to work in a professional pastry kitchen			NPTC group of colleges	Higher Education	Pastry chef in a hotel or restaurant as well as opportunity in the catering industry
Level 4	Foundation Degree	Professional Culinary Arts Management Foundation Degree	commodities and nutrition; food safety and hygiene; food, beverage and hospitality operations; culinary skills development; kitchen and restaurant operations; research in practice; marketing communications for hospitality; creative kitchen management; culinary research & development; management of food & beverage operations; human resources for hospitality managers; events planning.			Cardiff and Vale college	Final year BA (Hons) Culinary Arts Management at University College Birmingham	Head Chefs, Sous Chefs, Restaurant Managers

Source : Lifelong Learning Wales Record (LLWR) - May 2017

Those entering the industry without qualifications or experience tend to take a position in the front-of-house first, before moving into the kitchen if they have an interest in food and cooking. As staff move up the skills spectrum, specialist training can be provided for some areas such as patisserie, butchery etc. but it is usually gained through the professional network either at a competitor restaurant or via existing relationships rather than through a formal training setting, even though formal courses do exist. Examples of such formal training include: a Level 3 Diploma in Advanced Bakery, Patisserie & Confectionary Skills on a part-time basis provided by the NPTC Group (Table 3 Current Further Education and Higher Education Courses in Catering and Hospitality Related Courses in South East Wales (2015/16)Table 3). There are also accredited courses offered by private training providers such as a BTEC Apprenticeship in Craft Cuisine; a practical and theory-based course for professional chefs.<sup>33</sup>

Apprenticeships are generally becoming more attractive, with both staff and employers reporting them to be an effective way of achieving qualifications while on the job.

#### 4.5.2 Addressing Skills Gaps

The analysis of current provision above shows that there is a sizeable and steady supply of new entrants to the industry, with 9,145 current students across the South East of Wales, all within plausible travel distance to catering and hospitality businesses in the Vale of Usk. Furthermore, the range of courses provides the necessary core skills and expertise that employers demand. Current funded provision covers Level 1 to Level 4 of the CQFW, with courses ranging from professional cookery, to advanced bakery and patisserie, and including the necessary health and safety training.

Nonetheless, there are clearly gaps in provision. The survey findings show that businesses find it difficult to recruit head / executive level chefs. Furthermore, the industry appears to be lacking the ability to sell the story of local produce that is being purchased. As a result, the provenance of the Vale of Usk does not translate itself beyond the immediate area – evidenced by the difference in perceptions of the region among those from within and those outside the region (see Section 4.2.1). Businesses also prefer to train their staff in-house, whilst the nearest FE provider Coleg Gwent offers only a small proportion of work-based learning provision. Apprenticeships are growing in popularity although there are issues regarding the costs in time and money of taking on an apprentice, especially amongst the smaller employers. The small size of some kitchens makes the practicality of taking on apprentices prohibitive.

Furthermore, there is a clear demand from businesses for some form of education establishment to meet the needs and aspirations of the industry. Business skills as well as more basic, attitudinal attributes are also sought after – such as the ability to work consistently in pressure situations.

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<sup>33</sup> <http://aaawards.org.uk/btec-l2-and-l3-apprenticeship>

## 4.6 Recruitment

### Research Question:

- What are the preferred methods of recruitment?

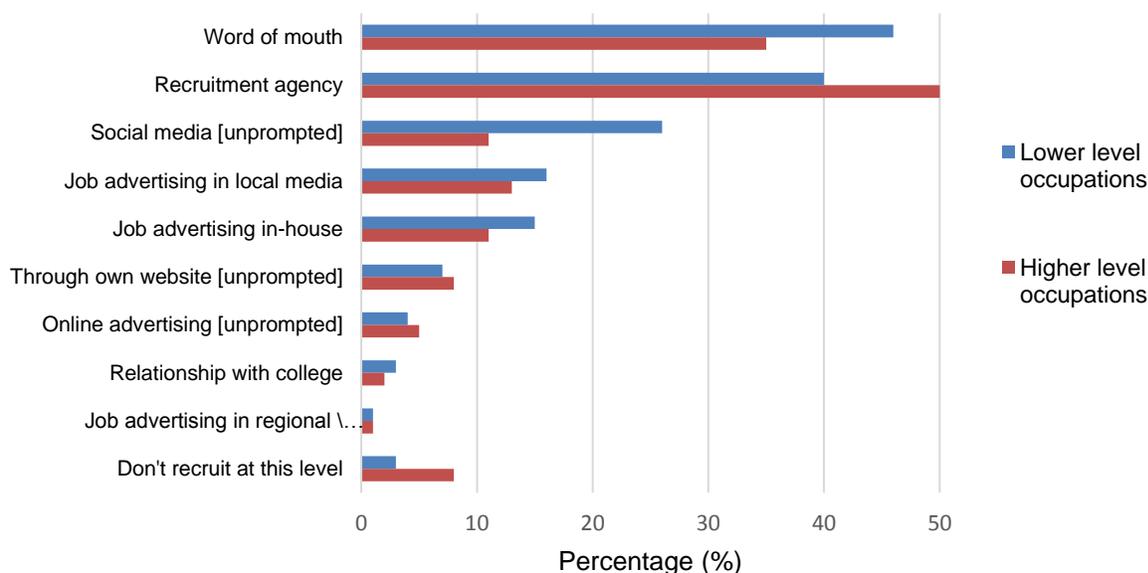
### Key Findings:

1. Word of mouth and recruitment agencies are the primary methods for finding staff
2. Social media and the 'chef grapevine' were cited as particularly useful for some, although industry publications are also used.
3. A high number of poor quality applicants for lower level occupations was frequently mentioned as an issue for many organisations, especially smaller companies.
4. Staffing and recruitment challenges persist – specifically recruiting those with serious interest

The provision of work opportunities across the hospitality and catering sector varies, dependent on the type of position being sought, and the type of organisation recruiting. In general, word of mouth and via a recruitment agency are used by the largest proportion of survey respondents (Figure 15). Just less than half of organisations (46 per cent) responding to the survey recruit through word of mouth for lower level occupations and half (50 per cent) of businesses use recruitment agencies for higher level occupations.

Other popular methods of recruitment for lower level occupations included use of a recruitment agency (40 per cent) and through social media (26 per cent). The in-depth qualitative interviews showed that larger employers tended to have well developed systems for recruiting. They frequently used agencies for lower level, temporary staff, e.g. for large events, and publications such as The Caterer for higher level occupations (some smaller organisations also used The Caterer). Discussions with stakeholders suggest that top-end restaurants tend to attract applications through their reputation and prestige, but that they can be limited in the number of employees they can take on - due to issues of space in the kitchens and finances. Shortfall in staff can have significant detrimental effects on these organisations, although they are generally short-lived.

Figure 15 Preferred method of recruitment (Percentage %), (April-June 2017)



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q16a and Q16b, Base = 100

One of the larger employers organised biannual recruitment days and also advertised on their website throughout the year. Smaller employers tended to begin recruitment through local advertising, potentially trading-off the potential to attract more experienced applicants with a preference for people located nearby. Some of the smaller employers also valued social media and the “chef grapevine” as a source of finding new recruits.

Nonetheless, large organisations, such as resorts, can suffer from under-staffing problems. For example, one organisation is currently short of 13 chefs. Another large venue relies heavily on recruitment agency staff in order to cater for events and seasonal demand. They employ a minimum number of staff on a permanent basis and will bring in several hundred agency workers for shorter periods. Only a small number of larger organisations who operate in this way can rely on local staff, most tend to source staff nationally or internationally. Generally front of house staff are successfully recruited locally.

Interestingly, few organisations (3 per cent) recruited through their relationship with local colleges for lower level occupations. One chef detailed his dislike of recruiting through the college,

*“They aren’t seasoned or tough enough ... it’s best if they cut their teeth somewhere else first with perhaps lower standards but high aspirations”*

Furthermore, one interviewee mentioned that the training from college tends to be tailored towards larger, public sector catering positions;

*“The training is well meaning, but very broad brush in its approach with a focus on schools and hospitals rather than on (top end) restaurants”*

During interviews, many individuals expressed a dislike of the number of approaches for positions from the jobcentre they received in response to adverts they posted. Many applications were received from people applying for jobs they were not interested in, just so that they could qualify for job seekers allowance.

The stakeholder interviews highlighted considerable variety in relation to expectations of new recruits and qualities sought. Front of house staff tended to be relatively easy to recruit and train. They were not required to have hospitality skills or experience (but some experience was valued), more importantly they were expected to be friendly, approachable and reliable.

Kitchen staff however were expected to have some levels of knowledge. Head chefs were expected to be 'fully trained' and experienced. Sous chefs/chefs de commis/de partie were generally expected to be experienced but there was more scope for upskilling in these roles. Stakeholders felt it was very difficult to assess chefs' skills on paper or from an interview alone, therefore tended to undertake a trial period of at least one month.

Lastly, lower level roles such as kitchen porters required enthusiasm and a strong work ethic but little or no experience was said to be needed.

## 4.7 Future Employment Needs and Growth Expectations

### Research Question:

- What are the future employment needs of the sector?

### Key Findings:

1. One in five (22 per cent) of surveyed businesses plan to expand
2. Primary growth plans are to expand existing site
3. Challenging times (economically and culturally) – the restaurant food culture is undergoing change
4. Survey respondents feel the Vale of Usk needs more advertising, marketing & publicity of the food offering in the area

### 4.7.1 Growth Opportunities

Twenty-two per cent of enterprises surveyed have plans to grow and expand – 12 per cent by expanding an existing site (that is, increasing the number of covers), 8 per cent by opening another hotel/restaurant/etcetera, and 2 per cent have other growth plans. Seventy-four percent of enterprises surveyed have no growth plans.<sup>34</sup> These figures suggest that there is an opportunity to work with enterprises to develop growth strategies and thereby fully capitalise on the opportunities provided by the Vale of Usk's reputation for high-quality catering and hospitality and local food and drink.

Furthermore, restaurants owners or managers felt that they do not currently have any issues linked to skills gaps when considering their growth ambitions. This may suggest there is scope for raising expectations and increasing the skills of the workforce to meet the expectations of more challenging consumers and to maximise the use of, and linkages to, local produce.

### 4.7.2 The Catering & Hospitality Industry Faces Challenging Times

Many stakeholders expressed concern about the state of the hospitality and catering sector and that it is facing, *“challenging times.”* Stakeholders believe that our ‘food culture’ per se is undergoing major change, with a shift from formal dining to more informal ‘walk ins’ and ‘pop-ups’ becoming more commonplace. They are concerned that this is reflected in the decline of skills within the industry,

*“we don’t gut fish any more, or do butchery – there’s no time - we order by portion instead ... but the occasional masterclass may be useful – knowing how to reduce food waste is a new skill which we didn’t have before, nose to tail eating, using stalks and bits that used to be thrown away”*

Nonetheless, such a shift in the food culture brings with it a demand for a different type of skill set as traditional skills such as butchery of fish filleting are replaced with a demand for story

<sup>34</sup> Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q14.

telling skills as chefs have to produce food in front of customers at street food stands for example. These skills are very important to making such pop-up restaurants add-value to the more traditional dining experience.

Stakeholders are also aware of the importance of creating and maintaining a good reputation – noting how people share reviews has changed with more use of social media, which brings its own challenges as its users are able to rate or slate businesses easily and publicly.

A further industry wide issue regarding the uncertainty for EU workers in the light of Brexit was highlighted through the qualitative interviews.

Lastly, a number of stakeholders suggested that the industry would benefit from an attitude shift encouraged by local and national government. They felt there was value in, “*joined up thinking to grow a food culture*”- a position that could be easily bolstered to support the local food sector and its producers.

## 4.8 The Need for an Education Establishment

### Research Question(s):

- Is there demand for a new catering establishment / college specifically created to address skills needs in the area?
- Should such an establishment be virtual (i.e. centred on existing assets and available to people outside of the area as well as people within the industry) or physical?
- Should such an establishment be wholly vocational in an education establishment or on-site education/training provision via a bespoke apprenticeship programme?

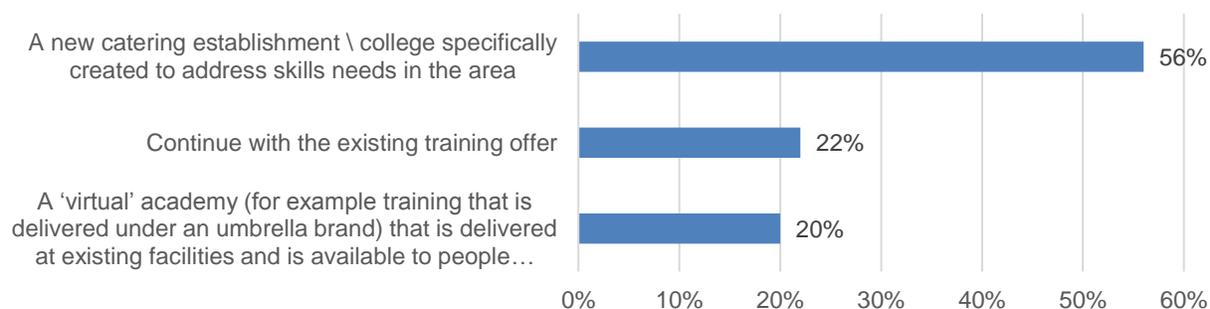
### Key Findings:

1. The findings of the business survey were conclusive in their support for either a new catering establishment (56 per cent) or a virtual academy (20%)
2. Only 22 per cent indicated a preference to continue with the existing training offer
3. 93 per cent of those interested in becoming part of a network were prepared to offer training or mentoring to other businesses.
4. A training facility offering a combination of on-site and bespoke academy / apprenticeship style training appears to most effectively meet industry need.

The majority of survey respondents (56 per cent) supported the creation of a new catering establishment or college specifically created to address the skills needs in the Vale of Usk area (59 per cent of only those businesses located in the Vale of Usk) (Figure 16). Two out of five businesses felt that a virtual college – for example training that is delivered under an umbrella brand - that is delivered at existing facilities and is available to people outside of the area as well as people within the industry in the Vale of Usk would best meet their needs. Meanwhile, 22 per cent felt that the current training offer sufficiently met their needs. Considering the strength of support for something new (either physical or virtual) – selected by three quarters of respondents – the research concludes that a new education establishment is required to meet the needs of the industry.

Current students engaged during the focus group generally thought that an academy would be a good way to gain confidence and to help enter the working world and to develop more robust / industry honed skills and possibly at a higher level than is currently available (without simply gaining on-the-job experience).

Figure 16 Potential to Establish an Education Establishment in the Vale of Usk to meet Industry Needs



Source: Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q27, Base = 100

Interestingly, there was little difference in the support for a new education establishment between businesses from within the Vale of Usk (59 per cent chose this option as that which would best meet the needs and aspirations of the sector) and those outside the Vale of Usk (52 per cent) - which could suggest that there is wider demand from the catering and hospitality industry at large – and that such an establishment could we meet the needs of businesses from the wider region.

Of those businesses who indicated that they were interested in becoming part of a network of chefs / hospitality professionals that might share skills training (44 per cent)<sup>35</sup>, 93 per cent were prepared to offer occasional training or mentoring to those businesses involved in the network.<sup>36</sup> Moreover, all of the businesses engaged during the in-depth interviews expressed support for such a network. Specifically, the in-depth research revealed enthusiasm for highly specialised training that filled gaps in existing provision. Moreover, it was noted that any initiative would need a collective effort, to include the full supply chain from food producers to manufactures, through the catering and hospitality industry to the end consumer. The gaps in provision which businesses expressed a desire to fill could all, at some level, be related to telling the back story and celebrating the local provenance of food.

*“It [an establishment] needs people with a passion for food and to involve suppliers too to instil an appreciation of produce ... experiential learning with a foundation in the supply chain, learning the back stories and selling these to punters”*

Coupling these sentiments with the earlier findings that there is a difficulty in recruiting high level chefs, the content of provision that should be delivered at such a site is clearer. The industry requires a mechanism to de-risk the upskilling of staff, from basic / entry level – which is well supplied by existing college based provision – to provide people with a clear career path to developing a skillset which maximises local produce and is able to effectively sell the provenance of the Vale of Usk, propelling awareness of the region as a food destination far

<sup>35</sup> Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q27.

<sup>36</sup> Vale of Usk Catering Study: Industry Perception Survey April-June 2017, Q28.

beyond its geographical boundaries. Importantly, it was the belief of those businesses interviewed that a steering committee of business owners should be involved in any developments going forward.

Based on the research findings, there does not appear to be a need for a wholly vocational education establishment – existing provision appears to meet the demand for such. Rather, the research suggests that on-site education / training provision better meets the needs of industry and will be more effective at addressing the gaps in training provision. They are, the gaps after existing vocational provision, which provides a grounding of knowledge, and the hands-on-experience that is needed to progress individuals through the skills spectrum. There appears to be industry support for a bespoke apprenticeship programme, which bridges the gap between existing, accredited provision and on-the-job training which provides individuals with the experience and skills that can only be gained through employment. An apprenticeship scheme is seen by those interviewed to be an effective way of addressing upskilling barriers that employers face regarding the cost and time necessary to train individuals. A shared apprenticeship, where the costs of employing and educating individuals are shared across organisations (or centrally via a funded body) and the requirement to train individuals – for example through a network of chefs / hospitality professionals sharing skills training was well received by businesses engaged during the research, both via the survey and during in-depth interviews.

## 5 Conclusions and Recommendations

### 5.1 Conclusions

This research has shown that there is sufficient Further Education and Work Based learning provision in South East Wales to provide a steady stream of lower-level skilled employees into the industry<sup>37</sup> – however, there is a lack of formal, on-going professional development provision which supports the needs of employers, as well as a perceived lack of available teaching establishments at the top-end of the skills spectrum for potential recruits / existing employees.<sup>38</sup> Specifically, the research identifies a significant lack of suitably skilled executive chef level applicants / people to fill job vacancies (evidenced by a high-level of hard to fill vacancies, see Figure 11). This implies a need for higher-level skills provision.

The existing process for current employees to gain the necessary skills and experience is informal. People tend to learn on the job – and through peer to peer training/mentoring (evidenced by 93 per cent of the sample training in-house, peer to peer<sup>39</sup>). This suits the industry to a certain extent, however there are barriers, mainly time and cost, for the development of staff – which is particularly a concern for the smaller organisations. The result of this is that there is a perception of poor career progression opportunities (three-quarters of the sample felt young people had unfavourable perceptions of the industry as a career<sup>40</sup>) and staff turnover levels can be high (one in five survey respondents reported high staff turnover levels), resulting in skills gaps – particularly at the higher end of the skills spectrum.

To fill gaps, higher-end staff tend to be recruited from other businesses. Nonetheless, there is evidence gathered during this research which shows a demand for an establishment which provides the mechanism for businesses to upskill their employees and plug the gaps in their organisation's skills and expertise. Of note, the ability to source, use and then sell local and seasonal food – i.e. by selling the back story to local food, are sought after skills for which there is no existing provision. These are the type of skills that currently tend to be passed from the more experienced staff to their junior counterparts during employment, when time and costs permit. Importantly for this research, there is a high-level of buy-in from the sector to become part of a network of chefs (44 per cent) who can share their experiences. And of those, nearly all (93 per cent) would be willing to offer training or mentoring to businesses in the network. This is a clear statement that the catering and hospitality businesses in the Vale of Usk would support the development of a network of chefs providing mentoring and training – if such a facility existed which enabled them to do so – which would create a structured process for upskilling the workforce, plugging the gaps in the hard to fill executive chef level vacancies and providing clear career progression for new entrants.

This will plug the observed gap in skills provision between the existing accredited training which provides new entrants, and the higher end executive chef skills – which needs to be delivered in a way which meets the needs of the businesses (in-house or on-the-job) and which develops

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<sup>37</sup> See Chapter 4.5 Existing Provision.

<sup>38</sup> See Section 4.5.2 Addressing Skills Gaps.

<sup>39</sup> See section 4.5.1.

<sup>40</sup> See Section 4.2.2

the specific skills they need – hence training which they can shape and be involved in delivering.

The suggestion to establish a new catering establishment to help overcome the barriers that those operating in the industry face – most notably the time and cost of training on-the-job as a result of the demands of the industry on staff time – was well received by the industry businesses and stakeholders engaged through this research. They expressed a high level of support for such an establishment (76 per cent of survey respondents felt there was a need for some form of education establishment), which was seen as way to spread the burden (and costs) of upskilling staff across a network of businesses. And importantly, one which could lead to the development of the type of staff they are looking for. That is, people who are highly skilled and knowledgeable about local and seasonal food sourcing and production, as well as having catering and hospitality business acumen – coupled with a commitment to further their careers in the industry.

Through engagement with key industry stakeholders, it is clear that there is spare capacity of commercial grade catering facilities in the Vale of Usk which have the potential to be used on a part-time basis for training purposes. Furthermore, there is an appetite among the businesses engaged (both stakeholders interviewed and those participating in the survey) to support both a new catering establishment and to provide training or mentoring within a catering and hospitality business network.

**It is our recommendation therefore, that the Vale of Usk could support a new catering college which does not compete with existing college based provision, but which focusses on providing the higher-end (e.g. up to executive chef level) skills that are specifically required by the businesses in the area.**

To do so, we suggest that the provision the catering college provides is unaccredited, bespoke training built around a core theme of utilising locally sourced produce (70 per cent of the sample already source within Vale of Usk) and selling the area as a food destination (28 per cent felt that more advertising / marketing or publicity of the food offering in the area would help to strengthen the industry). These are the type of skills that are accumulated by existing chefs and hospitality professionals through experience and which, through an academy like this, can be passed on to the next generation of executive chefs.

The research findings suggest that the Vale of Usk area does not appear to have a recognisable brand outside the area itself<sup>41</sup> – further supported by the desire among businesses for more advertising, marketing, publicity of the food offering<sup>42</sup>. The Vale of Usk does however have a number of strengths which could / should be used as marketing tools within local businesses to sell the area. The findings show that the area is particularly well known for its food festivals – specifically the Abergavenny Food Festival, its quality of locally sourced food, and its destination restaurants. These factors should therefore feature highly in the catering establishment and should be considered as part of the business planning process (see recommendation action 1 below).

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<sup>41</sup> See Figure 1.

<sup>42</sup> See Section 4.2.1.

Clearly, the research findings support the development of a new catering college in the Vale of Usk area. The establishment should provide the facilities to establish a central training hub for existing executive chefs and other top professionals in the catering and hospitality industry to impart their knowledge, skills and experience on the next generation of staff. Considering the plethora of existing facilities that could suitably host such an establishment, it is recommended that at first, a suitable existing site is utilised and a **pilot period of delivery** is initiated. This pilot phase should utilise the existing facilities available in the Vale of Usk. This suggestion is preferred as it de-risks the approach, and provides the opportunity to develop a network of interested chefs, develop the offer and the type of provision being delivered, before committing to a costly, resource intense approach such as occupying or refurbishing a building. If successful, a newly refurbished, alternative site could be developed as the organisation grows. The recommendations section takes these conclusions further, to offer a suggested course of actions.

## 5.2 Recommendations

This report recommends that a new catering establishment should be created in the Vale of Usk, in association with the Abergavenny Food Festival, Made in Monmouthshire, Coleg Gwent, and other local stakeholder groups – to build on and expand the region’s external brand.

In doing so, this will make a direct contribution towards the Local Action Group’s LDS recommendation to extend the knowledge, integrate experiences and develop a unique food offer. It would also help to establish the region as a food destination, and could provide a year-round attraction for visitors, building on its current strengths such as high quality local produce and nationally recognised food festivals.

The establishment would provide a central hub for a programme of training and masterclasses - driven by the needs of employers and delivered by a newly established Vale of Usk chef network, and financially supported by opening to the general public. In doing so, addressing the objective of the Vale of Usk Partnership to engage through a rural mentoring network, business to business supply network.

It is recommended that the facility utilises existing facilities at first on a **pilot phase basis** (for example 1 to 2 years of delivery) with a view to identifying new / refurbished premises thereafter- should the pilot prove to be successful.

There are several commercial grade kitchens underutilised which could provide the facilities for a pilot Monmouthshire catering academy programme. During the pilot phase, a network of chefs could be established and training provision designed and put into place. Following the pilot phase, the option to occupy a permanent physical location should be sought – if it were to be successful.

The establishment would be accessible to college leavers, industry employees and the general public, focussing on mentoring / masterclass style peer to peer training which addresses industry needs. Local produce sourcing knowledge/use, and sales and marketing skills (i.e. telling the back story to local food production and use) should be a focus on the training/mentoring provided. This type of provision can be tailored towards existing employees wishing to further their professional development (and thus address the skills gap at the higher

end of the skills spectrum), as well as for new industry entrants and those at the lower end of the food skills spectrum – so that it increases the general skills level of food production in the Vale of Usk, from the lower end of the food offer, right through to the highest level of food production. Furthermore, this research suggests that the focus of provision at the academy should be on the production of high-quality food, using locally sourced ingredients and in doing so selling the story of the region. This should be a key aim of the production of the training provision (see point 3 below). There are also opportunities for shared marketing with existing well-known festivals and local food producers and these should be considered.

To achieve the ambition detailed above, a list of recommendations is provided below and a timeline of actions and responsibilities is presented in Figure 17.

### **1. Create a new catering education establishment using existing facilities (pilot phase)**

It is suggested that at first, **a working group is established by the Vale of Usk LAG** to drive the ambition forward. This group should ensure coverage of representatives from both local government and the catering and hospitality industry as well as others. Their first task should be to develop or commission the development of a business plan, which sets out a detailed approach to developing such a facility. This report should be used as evidence of need to inform the business plan which should then clearly set out the ambition and detailed, costed activities for delivery. Also as part of the business planning process, suitable sites and funding sources should be identified and pursued. Using the business plan to secure funding, a pilot delivery phase over 1 to 2 years should take place at an existing facility.

An important element of the development, which will ensure its success and to help overcome current poor external perceptions of the Vale of Usk, will be the **creation of a marketing brand** for the establishment. The business plan should identify a brand strategy that could subsequently be commissioned to a media agency to develop and deliver. This should consider further promotion of the availability of local food – capitalising on the high proportion of food that is already sourced locally. Options such as meet the buyer events could be embedded into a sales and marketing strategy. An external brand development organisation would be recommended to assist with this task.

The pilot can be used to develop the mentoring / masterclass process and content of training programme delivery. The pilot's progress should be evaluated and monitored and if successful, the potential to grow / expand the facility should be pursued (see recommendation 4).

### **2. Establish a network of Vale of Usk businesses prepared to participate in the catering establishment**

An online presence should be developed to facilitate the establishment of a network of chefs – under a the newly created brand which will help to identify the initiative. The online presence could utilise existing services like the Monmouthshire Business Network portal or could be a stand-alone brand (dependent on the marketing strategy determined by the business planning process). Parameters for the operation of the network should be determined which guides the purpose and expectation of the network – including the benefits that the businesses themselves will benefit from. This will include access to highly skilled employees, support to help develop

staff skills and access to continual professional development for example. Then, industry partners should be recruited to the network, through existing relationships. The group should include both local producers and local business chefs as well as relationships with existing groups such as the Agri Urban Group, the Local Food Hubs initiative and any other group with supports the ambitions of the catering and hospitality establishment objectives. A key aim of the network of chefs should be to establish a cohort of highly skilled, local industry chefs who are passionate about the local food sector and who can effectively become inspirational teachers to new (and existing) catering and hospitality employees – which in turn will help to address the perceived poor career perceptions that the industry suffers from. The academy can become the mechanism through which to facilitate the transfer of knowledge and passion from the industry's chefs to the next generation of chefs that can propel the region's image as a food destination.

Options for funding the creation of a network should be identified, this might, for example be able to attract RDP funding while it is still available, or it may be that a trade association membership model for participating employers is pursued. This would tie in the businesses to be a part of the network and in return they have access to highly skilled individuals who are trained in a way in which they have had input (see recommendation 3).

### **3. Develop a programme of training and masterclasses**

Work with industry partners to identify content and develop training / masterclass solutions, including commercial courses for the general public.

To facilitate the development of the required skills it is suggested that experiential courses (i.e. taster sessions and local provenance knowledge development) with chefs and restaurateurs working closely with local artisan food producers are included, to allow those working in restaurants to fully understand the back story to the produce they use or serve. This will ensure that the full story of local produce is understood and also so that there is a connectivity between food producers and those preparing and selling the food to the end customer. This would help to address many of the issues the industry currently faces in the region, such as the lack of a recognisable brand outside the region. Importantly, the training offer should cover the full spectrum of food outlets so that the offer in the region as a whole is enhanced. This includes telling the back story to the food and selling the region as a food destination.

Although the research did not enquire about food ethics and sustainability, these are key overarching issues which receive a high degree of support from the Welsh Government<sup>43</sup> and therefore, it is suggested that any opportunities to embed these issues in training provision should be considered. This may for example, include measures for reducing food waste through good menu planning, reducing the carbon footprint of the food and drink industry by sourcing locally and minimising food miles, ensuring responsible and ethical sourcing to protect animal welfare, such as compliance with the Marine Stewardship Council (MSC) and other recognised sustainable food suppliers.

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<sup>43</sup> For example the Wellbeing and Future Generations (Wales) Act.

This may require procuring the services of a training provider to help develop course material or working closely with chefs from the entire range of food outlets to understand their specific skills and training requirements.

#### **4. Explore the potential for growth and expansion (setting up for post-pilot phase)**

During the pilot phase (and also during the development of the initial business plan) it is recommended that options for future growth and expansion are considered. It is suggested that these could be developed should the pilot phase of delivery be successful. The following potential growth opportunities are suggested:

- The development of a new location – or the refurbishment of an existing location to facilitate expansion.
- Complimentary activities such as establishing the site as a location for the sale of local produce (a local food hub) – there is potential for this to become a food destination hub in its own right – supporting the wider ambitions of the Vale of Usk LAG. Other options that could be considered include growing food at the site – making linkages with existing initiatives such as Incredible Edible Wales, and through partnership with Coleg Gwent, students could utilise the food during courses – further promoting the use of local produce.
- The establishment of a public facing restaurant for the students / users of the site to put into practice the skills they are gaining

A timeline of recommended actions and responsibilities is presented below:

Figure 17 Vale of Usk Catering Study: Recommendations Action Plan

Recommended Action	Suggested Steps	Responsibility	Timescale & Complexity		
			<6 mths	6-12 mths	1+ yrs
1) Create a new catering education establishment using existing facilities	Establish a catering education working group to include key partners (i.e. AFF, Made in Monmouthshire, Coleg Gwent etc.) to be tasked with driving this objective forward.	Vale of Usk LAG	Green		
	Identify suitable sites - working with MCC to identify sites with the potential to be used for this purpose.	Vale of Usk LAG - Working group	Green		
	Identify potential funding options		Green		
	Develop a business plan for the establishment including a pilot delivery phase utilising existing facilities, with a view for future expansion plans as appropriate.			Orange	
	Develop a marketing strategy and develop a brand / identity for the establishment			Orange	
	Secure funding				Red
	Secure location				Red
	Open and operate the establishment on a pilot basis for 1 to 2 years of delivery (dependent on the business plan)				Red
2) Establish a network of Vale of Usk businesses prepared to participate in the catering establishment	Develop an online presence for the network - this could utilise existing services like the Monmouthshire Business Network portal.		Vale of Usk LAG - Working group	Green	
	Set parameters for network - aims & objectives	Green			
	Recruit potential industry partners	Green			
3) Develop a programme of training and masterclasses	Identify content and develop training / masterclass solutions, including commercial courses for the general public.			Orange	
4) Explore the potential for growth and expansion	Explore the potential to grow / expand the site to include:				Orange
	a) The development of a new location				Orange
	b) Complimentary activities such as establishing the site as a location for the sale of local produce (a local food hub)				Orange
	c) The establishment of a public facing restaurant				Orange

Source: Miller Research (UK) Ltd.

<b>Key</b>	Green	Easier	Orange	Harder	Red	Hardest
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## Appendix

### Appendix 1 List of Electoral Wards within the Vale of Usk Local Action Group Territory

<b>Ward</b>	<b>Local Authority</b>	<b>Type</b>
Caerwent	Monmouthshire	Rural Wards
Crucorney	Monmouthshire	Rural Wards
Devauden	Monmouthshire	Rural Wards
Dixton with Osbaston	Monmouthshire	Rural Wards
Drybridge	Monmouthshire	Rural Wards
Goetre Fawr	Monmouthshire	Rural Wards
Llanbadoc	Monmouthshire	Rural Wards
Llanelly Hiill	Monmouthshire	Rural Wards
Llanfoist Fawr	Monmouthshire	Rural Wards
Llangybi Fawr	Monmouthshire	Rural Wards
Llanover	Monmouthshire	Rural Wards
Llantillio Crossenny	Monmouthshire	Rural Wards
Llanwenarth Ultra	Monmouthshire	Rural Wards
Mardy	Monmouthshire	Rural Wards
Mill	Monmouthshire	Rural Wards
Mitchel Troy	Monmouthshire	Rural Wards
Overmonnow	Monmouthshire	Rural Wards
Portskewett	Monmouthshire	Rural Wards
Raglan	Monmouthshire	Rural Wards
Rogiet	Monmouthshire	Rural Wards
St. Arvans	Monmouthshire	Rural Wards
Shirenewton	Monmouthshire	Rural Wards
The Elms	Monmouthshire	Rural Wards
Trellech United	Monmouthshire	Rural Wards
Usk	Monmouthshire	Rural Wards
Wyesham	Monmouthshire	Rural Wards
Caldicot Castle	Monmouthshire	Service Wards
Cantref	Monmouthshire	Service Wards
Croesonen	Monmouthshire	Service Wards
Castle Abergavenny	Monmouthshire	Service Wards
Dewstow	Monmouthshire	Service Wards
Green Lane	Monmouthshire	Service Wards
Grofield	Monmouthshire	Service Wards
Lansdown	Monmouthshire	Service Wards
Larkfield	Monmouthshire	Service Wards
Priory	Monmouthshire	Service Wards
St. Christophers	Monmouthshire	Service Wards

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St. Kingsmark	Monmouthshire	Service Wards
St. Mary's	Monmouthshire	Service Wards
Severn	Monmouthshire	Service Wards
Thornwell	Monmouthshire	Service Wards
West End	Monmouthshire	Service Wards
Llanwern	Newport	Rural Wards
Marshfield	Newport	Rural Wards
Graig	Newport	Service Wards
Carleen	Newport	Service Wards
Loadstone	Newport	Service Wards

Source: Vale of Usk Local Action Group

Appendix 2 Definition of Catering and Hospitality Sector by Standard Industrial Classification Codes

<b>Section I</b>	<b>Accommodation and food service activities</b>	<b>Included in Sector Definition?</b>	<b>Further Screening</b>
55100	Hotels and similar accommodation	Yes	Include only those serving food prepared on the premises
55201	Holiday centres and villages	Yes	Include only those serving food prepared on the premises
55202	Youth hostels	No	
55209	Other holiday and other collective accommodation	No	
55300	Recreational vehicle parks, trailer parks and camping grounds	No	
55900	Other accommodation	No	
56101	Licensed restaurants	Yes	
56102	Unlicensed restaurants and cafes	Yes	Exclude if primary activity is fast-food. & Only include if food prepared on site can also be consumed on-site*
56103	Take-away food shops and mobile food stands	No	
56210	Event catering activities	Yes	
56290	Other food services	Yes	
56301	Licensed clubs	No	
56302	Public houses and bars	Yes	Include only those serving food prepared on the premises

\*It was agreed that the survey would exclude this group as it was felt that the research findings may be skewed by the high proportion of multinational fast food restaurants for whom, decisions on training requirements are not typically governed by local companies – but rather by headquarters located outside Wales, and often outside the UK. Thus, this group did not meet the research criteria for the questions being sought and thus were excluded from the sample.

### Appendix 3 Vale of Usk Catering Study: Industry Perception Survey – Questionnaire April-June 2017

RQ1. We can conduct this interview in English or in Welsh. Which would you prefer?

RQ2. In terms of your food you serve, which of the following best describes what you offer?

RQ3. Does your establishment serve food that is prepared on site?

Q1b. Firstly, I'd like to ask a few questions about your perceptions of the 'Vale of Usk' catering Industry? On a scale of 1 to 5 (where 1 is poor and 5 is excellent) how would you rate the following aspects of the catering industry in the Vale of Usk? .....Quality of restaurants

Q1b. Firstly, I'd like to ask a few questions about your perceptions of the 'Vale of Usk' catering Industry? On a scale of 1 to 5 (where 1 is poor and 5 is excellent) how would you rate the following aspects of the catering industry in the Vale of Usk? .....Destination restaurants

Q1b. Firstly, I'd like to ask a few questions about your perceptions of the 'Vale of Usk' catering Industry? On a scale of 1 to 5 (where 1 is poor and 5 is excellent) how would you rate the following aspects of the catering industry in the Vale of Usk? .....Quality of chefs

Q1b. Firstly, I'd like to ask a few questions about your perceptions of the 'Vale of Usk' catering Industry? On a scale of 1 to 5 (where 1 is poor and 5 is excellent) how would you rate the following aspects of the catering industry in the Vale of Usk? .....Festivals \ The Abergavenny Food Festival

Q1b. Firstly, I'd like to ask a few questions about your perceptions of the 'Vale of Usk' catering Industry? On a scale of 1 to 5 (where 1 is poor and 5 is excellent) how would you rate the following aspects of the catering industry in the Vale of Usk? .....Quality of locally sourced food

Q1b. Firstly, I'd like to ask a few questions about your perceptions of the 'Vale of Usk' catering Industry? On a scale of 1 to 5 (where 1 is poor and 5 is excellent) how would you rate the following aspects of the catering industry in the Vale of Usk? .....A well-known food identity \ brand

Q2. What, if anything needs to be improved to strengthen the catering\hospitality industry and food offer in the Vale of Usk? [UNPROMPTED]

Rate: Average proportion of food and drink from Vale of Usk (among those who buy some)

Q3. Approximately what proportion of your food and drink supplies do you source from the Vale of Usk?

Q4. What are the main food and drink items that you source from the Vale of Usk region ? [UNPROMPTED]

Q5. Including yourself, approximately how many people who are directly involved in the catering \ hospitality elements of your businesses, do you employ?

Q6. Which of the following types of occupation \ job role do you currently have?

Q7. Which, if any, occupations are the hardest to fill \ find the right person for?

Q8. Why do you think they are hard to fill? [UNPROMPTED]

Q9a. Can you tell me are there any specific skills \ expertise that you find are lacking amongst...new recruits? [UNPROMPTED]

Q9b. And are there any specific skills \ expertise that you find are lacking amongst... existing staff? [UNPROMPTED]

Q10. Which, if any, of the following do you use to train your current workforce?

Q11. Which of these local (Vale of Usk) providers, if any, do you use?

Q12. Does existing skills and training provision available to you adequately meet your needs?

Q13 Why do you say that? [ existing skills and training provision does not meet needs]

Q14. Do you have any plans to pursue the following growth opportunities?

Q15 Are there any skills that you simply cannot find in the local \ regional workforce that you require for business growth ambitions? [UNPROMPTED]

Q16a Which of the following are your main\preferred methods of recruitment for.... Lower level occupations? (e.g. junior waiting staff \ back-of-house roles)

Q16b Which of the following are your main\preferred methods of recruitment for.... Higher level occupations? (e.g. manager level job, executive chef, head of department etc.)

Q17. In the past year, have you experienced high levels of staff turnover?

Q18 Why do you think that is? [experienced high levels of staff turnover] [UNPROMPTED]

Q19. In the past year, have you experienced difficulties in retaining any members of staff?

Q20 Why do you think this is? [difficulties retaining members of staff] [UNPROMPTED]

Q21 To what extent do you agree or disagree with the following statement... I think that young people have an unfavourable perception of a career in catering and hospitality

Q22 Why do you think that this is the case? [UNPROMPTED]

Q23 What do you think could or should be done to change these perceptions? [UNPROMPTED]

Q24 In general, how would you rate the skills and ability of your new, younger members of staff (specifically those recruited directly from school \ college)?

Q25 What skills \ abilities do they lack? [UNPROMPTED]

Q26. Which of the following do you think would best meets the needs and aspirations of the hospitality \ catering industry in the Vale of Usk?

Q27. Would you be interested in joining a network of chefs \ hospitality professionals who might share skills training?

Q28. Would you be prepared to offer occasional training or mentoring to those businesses involved in the network?

Q29 Finally, are you aware of any existing catering academy's \ colleges, or similar best practice activities that exist elsewhere? [UNPROMPTED]

#### Appendix 4 List of Key Stakeholders who Participated in the Research

- The Walnut Tree, Abergavenny
- The Hardwick, Abergavenny
- The Celtic Manor Resort
- Chepstow Race Course
- Coleg Gwent
- Cambrian Training
- The Castle Inn, Caldicot
- The Kings Arms, Abergavenny
- The Three Salmons, Usk
- The Priory, Caerleon
- Llansantffraed Court Hotel, Abergavenny
- Other Stakeholders: Pamela Mason (Agri Urban Group) & Gwyn Mathews

END.