**Skills Task Force**

**Research Paper 6**

**The Leisure Sector**

**Ewart Keep**

**Ken Mayhew**

**ESRC Centre on Skills, Knowledge and**

**Organisational Performance,**

**Oxford and Warwick Universities**

**September 1999**

**EXECUTIVE SUMMARY**

1. The leisure sector is extremely heterogeneous and is in some ways better thought of as an area of economic activity than a discrete set of occupations. Many large leisure sector employers (for example, the National Trust) require a wide range of skills, many of which might not immediately be associated with the sector. It is also important to note that the sector’s workforce includes a significant number of unwaged volunteers.

2. Employment in leisure has a number of characteristics:

• it is dominated by small employers and micro-businesses

• business representation is highly fragmented, relatively weak and extremely complex

• the workforce is predominantly young, part-time, female and lowly qualified

3. A number of trends are influencing the sector:

• a move towards ‘seamlessness’ and integration (for example, tour operators integrate travel agencies, airlines and accommodation within a single operation)

• restructuring, in the shape of franchising, sub-contracting (for example, of IT), and the use of technology to change skill profiles

• the structure of domestic UK demand means that many potential leisure consumers can only afford to buy on the basis of price rather than quality

1. Although the sector has problems with skills, these can be viewed as mainly third order issues which reflect decisions about other, more fundamental managerial choices such as product market and competitive strategies, service quality, work organisation, job design and employment conditions.

5. Many of the sector’s skills problems stem from its being perceived as a ‘poor’ employer. These perceptions arise because, in the main, employment in the leisure sector is characterised by:

• relatively low wages

• unsocial working hours and patterns of work

• weak equal opportunities policies

• poor or non-existent career structures

• informal recruitment systems

• a lack of formalised, sophisticated systems of human resource management

• lack of any significant trade union presence

• high levels of labour turnover

• The sector’s poor record on training is, in large part, a reflection of these structural characteristics.

6. If points 4 and 5 are accepted, then although enhanced skills can play a part in improving the quality and competitiveness of the sector, they will only do so as part of a wider strategy for change and upgrading in the industry.

7. Given this caveat, the report identifies a number of areas where vocational education and training provision might be improved. It concludes that with the possible exception of chefs, there are no serious skills shortages (as defined by the NSTF), but that there are major skills gaps among the existing workforce, including:

• entrepreneurial and management skills

• IT and customer care skills

• the training of volunteers

8. Many of the problems which this paper has identified have been echoed on numerous occasions by other reports and research throughout the UK (much of it commissioned by the industry itself). The problem has been a lack of concerted action, which in part reflects the institutional fragmentation within the sector. It is unclear who really ‘owns the problem’.

9. Debates about mis-matches between the output of the education system and the needs of the sector are extremely complex - too complex to be safely summarised for an executive report.

10. The paper ends by posing a series of questions about how and by whom major change might be encouraged.

**INTRODUCTION**

**Remit**

1. Our remit was to examine the nature and causes of recruitment difficulties within the sector. Are these the result of genuine skill shortages or do they reflect the sector's reputation for offering relatively poor employment conditions? We were also asked to see what changes are affecting the sector and determine their implications for skill needs and offer a critical appraisal of the skill requirements necessary to create and sustain a world class sector.

2. We sought information and research results on employment and skills from all the relevant NTOs/lead bodies (see Appendix 1), all TECs in England and Wales, and Scottish Enterprise and the LECs. We also checked our findings with academics working in the field of hotel, catering and leisure studies.

3. In pursuing the research goals outlined above, we found ourselves following in the footsteps of many other researchers and public and industry bodies. Many of the problems and issues which are recorded below have been pointed to by previous inquiries into the competitiveness and people management capacity of the sector. For just two example, see the 1992 NEDO report *UK Tourism: Competing for Growth* and the Department of National Heritage report *Tourism: Competing with the Best. No 3 - People Working in Tourism and Hospitality* (1996). The fact that many of the weaknesses and difficulties identified by this and much other earlier work endure suggests that their causes are extremely deep-seated and that tackling them will not be easy. What follows seeks to explain why this is the case.

4. Given the limitations of time, resources and space to present research findings, what follows is necessarily an overview rather than a detailed examination of the sector and its constituent parts. For an example of what a more detailed approach to this topic might involve, the Task Force is directed to the Scottish Tourism Research unit's 1998 report *International Benchmarking and Best Practice Study of Training and Education for Tourism*, which was commissioned by Scottish Enterprise and Highlands and Islands Enterprise. Our report seeks to offer a broad brush treatment and to identify general trends in what is a large, diverse sector.

5. The structure of the paper is as follows. The remainder of the introduction is taken up with a definition of the sector and this is followed by a section which provides a profile of the sector’s structural and labour market features. The next section examines the importance of skills issues and problems and where they come in the order of competitive and people management issues faced by organisations in the sector. The specific skill needs and issues that might be addressed by new and/or additional training effort are then reviewed, followed by a brief discussion of the fit between the VET system’s outputs and the needs of employers in the Leisure sector. The final section offers some overall conclusions.

**Defining the Sector - the problems of blurred edges**

6. Before going any further it is important to explain exactly how we define the sector. The old Employment Department composite definition of tourism encompassed:

• restaurants and cafes

• take away foodshops

• public houses and bars

• night clubs and licensed clubs

• hotels

• other tourist/short stay accommodation

• libraries and art galleries

• sport and other recreational activities

7. We have used this composite definition, but wish to emphasise that leisure may best be conceived of as a set of related forms of consumption rather than as a discrete area of employment.

8. For example, over the last decade or two shopping has become a leisure activity. Retail villages and craft centres feature in much of the promotional literature on local tourist attractions and in some cases specialist retailing is one of the main tourist attractions in a given town or location. A good example would be Hay-on-Wye, where second-hand bookselling (and an associated literary festival) is the mainspring of the town's economic activity. Also, in terms of its economic impact in a given locality, many jobs outside the leisure sector are dependent upon the spending generated by those engaged in leisure activities or upon supplying goods and services to leisure sector organisations. For example, in many tourist resort towns large sections of the retail sector are dependent upon visitors rather than the local populace for their customers.

9. Secondly, while some large segments of the leisure sector, such as hotels and catering have sectorally specific skills and can be separated out from other forms of economic activity and employment, many other leisure sector operations incorporate a wide mix of activities and skills. For example, the various attractions that form the core of the tourism trade embrace a huge range of activity and occupations, from amusement rides (e.g. Alton Towers) to steam railways, zoos and wildlife parks, stately homes, and museums. Because of this, the leisure sector encompasses an enormous range of different skills and occupations, many of which may not immediately be associated with it. For instance, one of the largest tourist attractions in the UK are the properties (houses and countryside) owned and managed by the National Trust (NT) - 50 million people visit NT owned land each year. Its workforce encompasses a wide variety of occupations and skills:

• gardening/horticulture

• environmental and ecological sciences

• conservation skills (buildings, their contents, and the natural and cultivated landscape)

• building and construction

• surveyors

• historians, curators and archivists

• land management

• forestry

• marketing and publicity

• catering

• retailing

• health and safety

• management skills, including project, contract and volunteer management

10. The Trust also reflects another of the distinctive features and complexities of the sector, the involvement of an important element of unwaged and voluntary labour. Volunteering is in itself a major leisure activity in the UK, and volunteers are a vital component of the NT's operations. Most visibly, they act as 'room wardens' in properties that are open to the public, but there are also about 14,000 volunteers who every year work on a variety of outdoor nature conservation projects and volunteers with specialist expertise will assist in every one of the above listed occupational groups and skills. Many local museums, canal trusts, sports clubs and sporting associations, environmental groups, and preserved railways 'employ' a volunteer workforce that far outnumbers their core of paid staff. Without the unpaid expertise and effort of the volunteer workforce many of these leisure attractions, especially in the heritage sector, would cease to be viable. This is a point to which we will return below.

1. Finally, significant parts of the sector rely on corporate customers (for example hotels on business conferences, and golf clubs on corporate members). It is also the case that there is a significant level of non-leisure users within customer demand, for example, the company rep staying in a travel lodge.

**SECTORAL PROFILE**

**Facts and Figures**

12. The UK tourism industry has a turnover of £37 billion p.a., equivalent to 5 per cent of GDP (Prism Research Ltd, 1997) and the UK has the fifth largest tourism industry in the world. Export and foreign exchange earnings amounted to £15 billion in 1997, equivalent in scale to motor vehicles and components and larger than North Sea oil, and the sector employs more than 2 million people or 7 per cent of the UK workforce. Employment growth has been above average in the sector over the last decade (30 per cent) and is expected to carry on growing. By 2006 one in five of all new jobs are expected to be in hospitality (*Employee Development Bulletin*, 106, October 1998:13).

**Structural Features of the Sector**

13. Given the problems of definition outlined above, it will come as little surprise that heterogeneity is one the features of the sector. The range of employing organisations involved in the leisure sector is wide and covers both the public and private sectors.

***A world of small businesses***.

14. Although there are large, multi-unit organisations involved in hotels, catering and tourism (for example, the Church of England, McDonalds, Holiday Inns, Thomson, Granada, Marriott, English Heritage, Pearson [owner of the Tussaud Group], and the National Trust), the bulk of employers and of economic activity in the sector is in the hands of relatively small employers, many of which are micro businesses (for example, B&B operators). In 1997, only 8.8 per cent of hotels and hotel groups had a turnover of more than £1 million, and in 1996 only 2.4 per cent of catering (including pubs) organisations had an annual turnover of more than £1 million.

15. In the leisure sector as a whole 87 per cent of establishments employ less than 10 people, and this figure rises to 92 per cent in the restaurant trade (Prism Research, 1997:4), but employers with more than 35 employees, while accounting for just 3 per cent of establishments, employ 36 per cent of the workforce. Many of these small, family-owned enterprises operate on the margins of economic viability, and, in the case of many smaller tourist attractions, only form a second or supplementary source of income to their owners (Phillimore, 1997). Barriers to entry are low, and specialist qualifications are not a requirement in order to operate. Partly as a consequence, the standards of managerial expertise and competence are variable and there are relatively few organisations that could be said to operate at the leading edge of good practice (for example, in terms of people management policies and practices).

***Fragmented and weakly organised***.

16. The sector and its constituent sub-sectors are characterised by a multiplicity of over-lapping local, regional, national, sectoral and occupational organisations which in one way or another seek to both represent elements of the sector and to influence skill levels and other aspects of business practice. Many of these are relatively thinly resourced and communication and co-ordination between them is often poor. It is also the case that for those working in much of the sector there is no obligation to join a professional or trade association and therefore the ability of many of the representative bodies to deliver the active engagement of the broad mass of employers in change initiatives is often very limited.

***A youthful, part-time, female, lowly qualified workforce***.

17. In 1994, 43 per cent of workers in UK hotels and catering employment were aged under 30 and in some sub-sector of the industry, such as fast foods, which tend to target students and other young people as a potential workforce, the figures can be much higher. Of Burger King's 3000 workers, 40 per cent are under 18, while at McDonald's around 60 per cent of all staff are aged under 21 (Scottish Tourism Research Unit, 1998:102).

18. Part-time employment is very important in the sector and is significantly higher in the hotel and restaurant trades in the UK (49 per cent of the workforce in 1997) as compared to many other EU countries such as Austria, 16.5 per cent; France, 23 per cent; Greece, 0.5 per cent; and Italy, 11.5 per cent (Hjalager and Baum, 1998:3-4).

19. In terms of gender composition, in 1994 females accounted for 73 per cent of the sector's workforce. The only occupational groups where men outnumber women are publicans and hotel porters (Prism Research, 1997:5).

20. The sector as a whole has a reputation for not being at the forefront of training practice and of employing a poorly educated and under-trained workforce, though there are exceptions - such as the museums sub-sector. However, overall, the perception of the sector as lagging behind in the field of training appears accurate. Hospitality Training Foundation figures (HTF, 1998:7) show that in hotels, catering and pubs in 1994, nearly a quarter (24.6 per cent) of all employees in the industry possessed no qualifications, compared with a national all industry average of 18 per cent.

21. Compared to a sector like motor manufacture - dominated by a handful of multinational giants with homogeneous technology and production methods, and consequently relatively tightly grouped skill needs - the leisure sector confronts policy makers with a myriad of disparate issues, problems and demands. It also presents them with a sector and series of sub-sectors that are highly fragmented and weakly organised in representational terms. This combination of factors makes interventions aimed at generalised change a daunting prospect.

**Factors Affecting the Sector**

22. The literature suggests a line-up of the usual suspects, for example internationalisation/’globalisation’ (the UK's share of world tourism has fell from 5.6 per cent to 5 per cent between 1986 and 1996), and growing consumer demand for higher quality offerings (though this latter pressure co-exists with a sharp growth in mass standardised leisure products sold in part on the basis of price, such as fast food, 'no frills' airlines and budget hotels).

***Seamlessness***.

23. Different leisure activities are becoming more seamless, for example, tour operators integrate travel agents, airlines and accommodation within a single operation; while hotels offer a range of leisure attractions like golf, fishing and riding (Hjalager and Baum, 1998).

***Re-structuring***.

24. A variety of forms of re-structuring are starting to affect the sector, including greater outsourcing and franchising. In terms of employment, the sub-contracting of some areas (for example IT services) means a re-focusing of the core competencies required by leisure sector operators and an associated upgrading and enhanced specialisation in ancillary tasks which may be located far from the point of service delivery (for example, reservation call centres). At the same time, some sections of the workforce are being de-skilled (for example through the use of pre-cooked items, standardised menus and automated cooking technology) (Hjalager and Baum, 1998).

***Economic unpredictability***.

25. The levels of volatility in demand experienced in this sector are high. During the slump of the early 1990s, receivers collectively controlled more hotels in the UK than any other hotel company apart from Forte (Prism Research, 1997:4). While there are easily identifiable long-term trends that managements can plan for and respond to (like the growth of second holidays and the extension of the 'shoulders' of the tourist season to cover more of the year), many other factors are short-term, unpredictable and outside the control of management. For example, the combination of a strong pound, which encouraged overseas holidays, and dreadful summer weather, meant a fall of up to 30 per cent in visitor numbers at some N. Wales tourist attractions in 1998 (*Ffestiniog Railway Magazine*, No 162, Autumn 1998, p. 236).

***The structure of domestic demand***.

26. One factor that very rarely gets a mention, but which we would suggest is of crucial importance in explaining some of the product market and people management problems faced by the UK leisure sector, is the structure of UK domestic demand. Leisure activities (where they have to be paid for rather than those that can be enjoyed without charge or associated spending) fall into the category of discretionary expenditure. They are not necessities like food, clothing, housing, fuel and can best be regarded as 'luxuries' which are purchased once the basic requirements of existence have been satisfied and budgeted for. If incomes are limited, this may mean that the money available for holidays, days out, trips to the theatre and cinema, and eating out are either sufficient to fund only a small number of such events or to rule out entirely whole ranges of leisure activity. In a country where a significant proportion of the population live in relative poverty and have limited or extremely limited disposable incomes to devote to discretionary spending, this means that there will be a substantial market for leisure activities that have as a prime selling point relative cheapness. For organisations that cater to this segment of the market, price rather than leadership on quality will be the main consideration in developing product market strategies and sustaining competitiveness. In this context by quality we mean high spec rather than the achievement of standardised delivery to a relatively low specification. The market for package tour holidays is a good example. Some will be able to opt for a P&O cruise. Others will have little option but to be hunting for a 'bargain' fortnight in the South of Spain. Others again will be able to afford no annual holiday.

27. In countries like Sweden, Norway and Germany, where high levels of basic income and egalitarian social and taxation policies mean that poverty is relatively rare and affects only a very limited proportion of the population, such considerations have only limited impact on the product market and competitive strategies of the leisure sector. There will be a general tendency for the product to be higher spec, for margins to be higher and for the workforce that delivers the product to reflect this (in terms of wages and skill levels). In a country like the UK, where income distribution is highly attenuated and where a very significant proportion of the population live in relative poverty, the problem looms large. Over the last 20 years the UK has witnessed a sharp rise (more than 150 per cent) in the number of people living on half of average income. In 1982 there were 4 million people who fell into this category. In 1996/97 no less than 10.5 million were affected (*Joseph Rowntree Foundation Findings*, December 1998:1). The proportion of children living in households with below half average income in 1995/96 was a third (4.3 million), up from just 10 per cent in 1968 (Gregg, Harkness and Machin, 1999).

28. The overall effect of this pattern of income distribution on spending decisions is noticeable. Nearly 20 per cent of the poorest fifth of the population lack bank or building society accounts and half have no house contents insurance (Howarth et al, 1998). In terms of spending on leisure activities, the Breadline Britain study's survey of 1,800 adults suggested that in 1990 financial constraints meant that 7 per cent lacked a hobby or leisure activity, 14 per cent were unable to afford a night out fortnightly, and 22 per cent could not afford a monthly restaurant meal (Frayman et al, 1991). A significant proportion of the population are too poor to take an annual holiday, perhaps as many as 40 per cent of British adults (Family Holiday Association, 1999). In one sense, these figures are the tip of the iceberg. For every family that cannot afford a holiday away from home or to indulge in other leisure activities, there are many more who can do so only by adopting a very price conscious approach to the purchase of leisure services. This in turn has profound implications for the skill requirements of organisations catering for this segment of the market.

29. Bearing in mind the shape and structure of the sector and the forces acting upon it, where does the issue of skills fit into the wider picture on competitiveness and business performance? To what extent are skill shortages and a potential skills gap major brakes on developing a higher quality and more efficient leisure sector?

**Skills - A Third Order problem?**

30. The remit we were given makes reference to the creation of a skills base to sustain a 'world class' sector. This raises the important question of whether enhanced skill levels are being seen as the primary catalyst for the creation of these conditions, or whether they are being viewed as simply one part of a much wider need for change within the sector embracing issues such as product market strategy, approaches to market segmentation, service quality, employment conditions, work organisation, job design and so on. To put it another way, are skill levels a first order decision, or are they a second or third order decision the outcome of which tends to reflect prior decisions about many of the above mentioned issues?

31. Both academic research and the wealth of consultancy reports on the sector (many of which have been commissioned by TECs, Scottish Enterprise, and the various ITOs and NTOs) make it clear that although the skills base in leisure is a problem, it is not the main one and is often contingent upon other structural factors. First order problems are those concerning the ownership structure of the industry and the preponderance of very small, owner managed micro-businesses, coupled with low profit margins and trends in the choice of competitive strategy that are, in some segments of the sector, emphasising cost-based competition. These types of product market and market segmentation strategies in turn tend to exacerbate long-standing second order problems relating to the structure of the labour market and poor personnel management practices, which cover:

• Wage rates tend to be low, though as noted above, where skills shortages have become apparent, particularly in relation to chefs, wages are reported to be rising fast (HTF, 1998). In general, however, the sector offers many employees reward packages that are lower than found elsewhere in employment in service occupations. Indeed, large parts of this sector used to be covered by wages councils and the National Minimum Wage (NMW) is liable to have a significant impact within the sector (30 per cent of the employees in hospitality will be affected - 350,000 workers).

• Unsocial hours and family unfriendly shift patterns are prevalent. The HTF in its submission to the NSTF indicated that employers in the trade nominated unsocial hours as the leading reason for recruitment difficulties (HTF, 1998:13). Much of the employment is highly seasonal, with about half of all UK tourist attractions closed in the winter (Yale, 1992; see also Phillimore, 1997).

• Despite, or perhaps because of, a workforce in which women and ethnic minorities are over-represented in hotels and catering, equal opportunities policies are rare and the better paid, higher status and more skilled jobs continue to be held largely by males. The Commission for Racial Equality's 1991 report on employment in the hotels sector suggested that there were major, structural shortcomings in recruitment practices and that racial discrimination was a significant problem. Price argues that it is unlikely that this situation will have changed much since then (1994:46) and her study (with Quinn) of graduates and HNDs in the hotel industry offers evidence of lower salaries for female graduate workers in the industry that cannot be explained by part-time employment, gaps from career development caused by child rearing (Purcell and Quinn, 1996).

• Career structures are poor or non-existent. There is also much use of casualised seasonal employment and insofar as a core/periphery model can be applied, it would appear that the core that can expect relatively strong degrees of employment security and opportunities for progression is limited to a very small segment of the workforce - in hotels and catering only managers and trainee managers. Skilled operatives hence fall into the periphery and there is a heavy reliance on the external labour market to meet skill needs rather than develop internal labour markets and increase internal mobility (Guerrier and Lockwood, 1989).

• Recruitment practices tend to be informal, with significant reliance on word of mouth contacts.

• The widespread adoption of formalised 'good practice' models of human resource management and HRD is lacking. The sector's deficiencies in people management practices are of long-standing. As long ago as 1971 the Commission on Industrial Relations pointed out the weakness or non-existence of well-developed, formalised personnel and industrial relations (IR) policies in the hotels and catering industry (Price, 1994:45). Price also notes that "students returning .......from their industrial placement year bring back remarkable stories of poor personnel practice from some of the 'best' UK hotels and restaurants; few have ever seen a job description, disciplinary or grievance procedure or internally published salary scale, and many have been required to work overtime at plain time rates or for no pay at all. The overall picture is one of ad hoc, informal practice which pays scant regard to professional standards" (1994:47).

• There is a lack of any significant trade union presence. According to the third Workplace Industrial Relations Survey (WIRS), Hotels and Catering had the lowest trade union presence (3 per cent union membership, union recognition in 8 per cent of establishments) of any sector in the economy - Millward et al, 1992:107). This means that upskilling based on a social partnership model and the TUC's Bargaining for Skills initiative are liable to have minimal impact within this sector.

• All of these characteristics contribute to high levels of labour turnover. A recent Hospitality Training Foundation (HTF) survey suggested an annual turnover rate of 48 per cent in hotels, catering, restaurants, and pubs (HTF, 1998). The DfEE's Skill Needs in Britain survey (using a much smaller sectoral sample) suggested an annual turnover rate of 74 per cent. There is some evidence (Hands, 1995) that those employees who move out of the sector tend to be the more highly qualified members of the workforce. The main response of most employers in the sector would appear to be to accept this situation as an immutable fact of life, hope for the best and try to work round the problems it causes on an ad hoc basis. As the HTF admitted in their submission to the NSTF, "asked to comment on turnover, 44 per cent of employers acknowledged that it was a problem, but saw it as a way of life. 56 per cent of employers simply did not view labour turnover as a problem" (1998: 16).

• Overall, report after report and study after study underline the difficulty of recruiting into the industry and then retaining people of the required calibre in the face of a sectoral labour market that, on the whole, offers people worse reward and poorer career opportunities than other parts of the economy. On the whole, human capital does not seem to be highly valued in the sector.

32. Given this depressing picture of people management, and the predominance of small employers, it is unsurprising that the sector's record on training is generally so poor. Shaw and Williams characterise the tourism workforce as "uneducated, unmotivated, untrained, unskilled and unproductive" (1994: 142) and the Hotel and Catering Training Company's 1995 report *Training Who Needs It?*, concluded that the sector is "one of the most under-qualified industries and displays one of the lowest levels of training activity in the UK economy". Evidence from WESTEC's 1997 employers survey suggested that hotels and catering employers were less likely to have a management development plan (18 per cent as against 31 per cent in the local economy at large); a company training plan (14 per cent as against 39 per cent); or a training budget (23 per cent as against the average of 37 per cent) (Prism Research, 1997:22). Much of the training that does take place is driven by legislative requirements (H&S and food hygiene) and is informal, uncertified and "likely to do little to raise the skill levels of the workforce to any significant extent" (Prism Research, 1997:28). A survey of tourism employees in East Anglia found that about 45 per cent had never been given the opportunity by their current employer to discuss how best to develop their skills and career potential (Hands, 1995:24-25).

33. These problems with training and skills are in large part simply a reflection and consequence of the first and second order constraints outlined above. We would argue that unless and until many of these first and second order problems are confronted and addressed, progress on creating a 'world class' skills base for the sector is liable to be slow and halting and investments in upskilling produce low private and public rates of return.

34. As Baum and Nickson underline, weak employment conditions create one the central dilemmas in terms of product quality, "the contradiction here is that there is an expectation that....quality service is delivered by those receiving the poorest remuneration, working in the least attractive conditions and in a casual or temporary capacity" (1998:75, see also Baum 1995; Wood, 1992). The key to a different order of service quality would appear to be a different style of workforce management. There are few visible shortcuts to achieving this. Simply supplying a better qualified workforce does not, necessarily, mean that product market and service quality strategies will alter. A good example would be the fast food chains. Many of their part-time staff are students (either from local FE or HE institutions). Despite having employees with much higher levels of qualification that have traditionally been associated with working in fast food retailing, product market and service strategies do not appear to have altered in order to reflect the latent capabilities of a better educated workforce. McDonalds is still McDonalds. It has not transformed itself into Pret a Manger.

35. Over the last decade and a half the standard response at national, sectoral and local/regional levels to most forms of skills problems and deficiencies has been to pursue initiatives aimed at increasing the supply of skilled employees available in the labour market. If the above argument is correct, a strategy based on boosting the supply of skills, whether through full-time education or work-based training, will not produce the desired results. As one of the many consultancy reports on the sector puts it, "since the reasons identified for recruitment difficulties related primarily to pay and conditions rather than skills, the response needs to be broader than simply increasing the pool of appropriately skilled labour" (Prism Research, 1997:13). Skills can undoubtedly play a part in promoting the success of the sector, but will only have a major, strategic impact as part of wider strategy for change and upgrading in the industry.

**Skill Needs and Issues in the Sector**

36. Given this important caveat, what specific interventions in the area of VET might be worth exploring? The first consideration is that there is little evidence of any widespread skills shortages in the sense that the NSTF has chosen to define them. Unfortunately, neither the literature nor our discussions with those involved in the industry (whether as practitioners or those who study it) have reached unanimity on the existence of genuine skill shortages, but insofar as they do exist, they seem likely to be confined to particular geographic areas (e.g. London) and perhaps to small, relatively specialised occupational areas, such as chefs (HTF, 1998).

37. For the rest, as suggested above, the problems are primarily concerned with wider weaknesses in people management policies and practices. Recruitment difficulties stem, not from a lack of appropriately skilled staff available in the labour market, but from high levels of labour turnover, the migration of leisure sector employees into other areas of employment, and the overall relative unattractiveness of employment in the sector.

38. Skills gaps appear more prevalent. Indeed, hotels and catering employers tend to be much more likely to report the existence of a skills gap than other employers. Communication (including language), IT and customer care skills are frequently mentioned.

39. It is important to be aware that there are already in train numerous initiatives aimed at addressing skill shortages and gaps in the sector. Some are local (for example, plans in Cardiff and the Vale of Glamorgan, see Stevens and Associates, 1998), others regional/national (see Tourism Training Scotland, 1998). In London, where labour market pressures have been particularly acute, a range of initiatives, including a privately owned chefs training school, a training centre which prepares the unemployed for work in the hospitality industry, and a chef training scheme piloted by the homelessness charity Centrepoint have recently been launched (for details of these see *Employee Development Bulletin*, 106, October 1998:13-16). The London Hotel Training Centre for the unemployed is the harbinger of a national network of up to 30 such centres which are being created as part of the government's New deal. The aim is for them to train up to 40,000 unemployed youngsters over the next few years. In addition, a new quality standard for the sector (embracing both ISO9002 and IIP quality standards) has been developed under the Hospitality Assured initiative, and the DTI, via its Sector Challenge Fund, has part-financed a three year programme (launched in 1998 in conjunction with the British Hospitality Association) under the banner of Excellence through People. EtP takes the form of a series of half day seminars, action packs, and a video all of which are aimed at encouraging commitment to gaining IIP status. The programme is being rolled out to 8000 SME's in the sector during the coming year. For details of initiatives in Scotland, see Scottish Tourism Research Unit, 1998.

40. It is plainly important that any new initiatives or measures suggested by the NSTF do not duplicate or further complicate what is already a dense and complex patchwork of VET provision in this sector. That said, what areas might benefit from improved provision?

**Entrepreneurial and Management Skills**

41. The aim of many who enter the sector is to eventually start up their own business. Chefs were cited to us as a group where this desire was particularly strong. Barriers to entry are fairly low, and the level of business start ups is high. So too is the level of business failures. It may be therefore that greater attention needs to be devoted to inculcating entrepreneurial skills within the sector. In part, this could be met by changes to the curriculum within initial training - for example, courses aimed at chefs. The would also be benefit in enhancing the supply of training opportunities for those adult workers preparing to start their own business.

42. Besides weaknesses with entrepreneurial training, there are numerous references in the literature on this sector to the general weakness of management education, training and development (METD). An Hotel and Catering Training Company report (1992) indicated that in 1989 only 10 per cent of managers in the UK hotel and catering industry had a degree or HND, as compared to 41 per cent of managers in all industries and a survey undertaken for Norfolk and Waveney TEC showed that within half of the businesses in the sector the head of the company lacked any formal qualifications and two fifths of employers reported that the head of the business had never undertaken any management development or training (Hands, 1995:19-20). Moreover, "it is common for individuals to achieve significant promotions without having to enhance their level of qualification. This is especially concerning given the low base of qualification from which individuals in the sector are starting" (Hands, 1995:33).

43. Compounding this problem is the absence of structured routes into managerial jobs in the sector. The general absence of well defined career management and development systems and procedures suggests that some of the most able (and, as mentioned above, better qualified workers) leave the sector in search of advancement in other sectors where access to managerial opportunities are better structured (Mulvaney, 1999).

44. Without a more skilled managerial cadre it is hard to envisage how any effort aimed at systemic improvement and upgrading in the strategic managerial capacity of the sector can succeed. The ability of management to analyse, develop coherent long-term plans and offer the practical and strategic leadership needed to promote and manage the transition to a higher quality, higher value added approach to competition is a prerequisite for creating a world class sector.

45. How the necessary transformation of the existing managerial stock is to be achieved is not readily apparent to us. There are indications of significant obstacles to progress. One is the structure of the sector. Micro businesses and owner managers have hitherto represented those segments of the managerial labour force that it has proved hardest to engage successfully with in promoting more and better METD (see Lynch, 1994 for a useful discussion of the problems of training for bed and breakfast operators). Despite numerous attempts by a range of VET providers, including FE, business schools, commercial training providers and local authorities, the development and marketing of courses that will be of wide appeal to small business managers has so far proved an elusive goal.

46. Even among larger and more progressive employers in the sector, where a need for METD is recognised and acknowledged, the willingness to pay for training appears worryingly limited. Price (1994) reports on a survey on management training which she conducted among larger, leading employers in the hotels and catering industry. This showed that there was publicly available training to meet the skill needs employers had identified, but that employers were generally unwilling to pay for it. Over a third of respondents were willing to spend a maximum of £50-00 per day on a management training course at a time when the Hotel and Catering Training Company (HCTC) was charging £175-00 plus VAT per day for their provision. "The implication of this finding", Price suggests "is that if training is to be taken up then either it must be offered more cheaply, which in effect means it must be subsidised by public funds, or employers must be prepared to pay more" (1994:56).

47. It may be that this a target group that the UfI could be encouraged to home in on, particularly in relation to its third developmental priority - the skill needs of small and medium-sized businesses. The problems of this sector might also form a useful priority for the Management and Enterprise National Training Organisation (METO) and the planned new national Management and Enterprise Council (MEC), which the DTI's recent white paper on competitiveness suggests will be charged with producing a management development strategy for the UK. Within any such strategy, specific areas for attention ought to be marketing, which is mentioned in numerous surveys of skill needs in the sector; and also personnel management/HRM. Greater people management skills would appear to be key if many of the issues highlighted above are ever to be addressed by leisure sector employers (Price, 1994).

**IT, Customer Care and the 'Skills Gap'**

48. HTF survey-based research undertaken in support of their submission to the NSTF showed an employers' ranking of skills lacking in applicants ordered thus:

social skills 56 per cent

customer care 52 per cent

job specific 38 per cent

literacy/numeracy 30 per cent

communication 26 per cent

and many of the reports on the industry highlight a similar list of candidates for the sectoral skills gap among the existing workforce. These problems may, in part, be a reflection of low recruitment standards. How are these best to be tackled?

49. Indications from Scotland, where approaches to training in the sector appear more co-ordinated than in England and Wales, is that the most effective mechanism is a limited range of short (one, two or three day duration) training events, strongly marketed to the sector under user-friendly brand names and utilising Tourism Training Scotland's own internal certification rather than any attempt at a blanket insistence on the use of SVQs (TTS, 1998). Offerings include:

Welcome Host - basic customer care

Scotland's Best - service quality programme

Natural Cook - promoting awareness of Scottish produce

Tourism Business Success - management skills

50. It is this kind of approach that is being suggested for Cardiff and the Vale of Glamorgan's tourism and hospitality training strategy (Stevens & Associates, 1998).

**Volunteers**

51. As has been suggested above, a significant proportion of leisure sector organisations (museums, heritage and environmental attractions and many forms of sporting activity) are relatively unusual in relying on a substantial number of unwaged (volunteer) employees. In one sense, tourism and leisure provides a different or more complex model of the standard core/periphery workforce. Rather than a two way split between a full-time, permanent core and a part-time, often temporary or seasonal peripheral workforce, tourism and leisure has a mix of workers - some full-time, some part-time, some temporary, some permanent, some waged and some unwaged. Many volunteers undertake 'core' tasks and possess expertise and skills that are essential to the continued existence of the operation/attraction.

52. For example, besides a core of full-time paid employees Phillimore's study of tourist attractions in rural Herefordshire noted that volunteers were the largest single group in the workforce, "represent over a third of tourism employees and play a key role in the industry's viability" (1997:18). Some of these are part-time. Others, often retired people, are full-time. The scale of volunteer activity in sections of the tourism and leisure sector also needs to be underlined. A single preserved railway (the Severn Valley which runs between Kidderminster and Bridgenorth) has a total volunteer workforce of 1,200 which supplements the work of the much smaller number of paid employees. Although a proportion of the jobs that the volunteers undertake are relatively lowly skilled, this is by no means always the case. Many volunteers bring with them or develop high levels of expertise in health and safety critical areas as diverse as railway locomotive driving, mechanical engineering and railway signalling. There are signs of increasing competition for volunteers in some segments of the leisure sector (Phillimore, 1997:18). At the same time, the importance of volunteer labour is growing, in part, because for various kinds of grant aid, particularly national lottery funding, volunteers’ work can be assigned a financial value and counted towards the ‘matching’ funding which the recipient body is required to raise.

53. In terms of skill needs among the volunteer workforce, the following appear particularly important:

• volunteer management and leadership

• H&S

• customer care skills

• specialised skills and knowledge related to their job roles (many of these will not be skills normally associated with the leisure sector)

54. The DfEE's £15 million Millennium Volunteers programme is a welcome attempt to stimulate interest in volunteering among young people (16-25) and to help provide structure and validation for the skills and experience acquired during such work thereby enhancing individual employability. However, in an age where 'lifelong learning' is the watchword of VET policy, it is disappointing that the remit of this programme is restricted to young people and excludes the majority of the population, including the majority of the volunteering population. National Trust statistics suggest that only 12 per cent of their regular volunteers are aged under 35, and only 3 per cent under 25 (*National Trust Environmental Link*, No 2, 1998, p1). While the Millennium Volunteers programme may thus help produce some of the next generation of volunteers, it does nothing for the mass of the existing volunteer workforce.

**Lots of Analysis, Less Action and the Issue of Institutional Mechanisms**

55. A review of the literature on the leisure sector reveals a number of common and re-occurring themes. One of these is the wealth of reports that have been commissioned into training and 'manpower'/HRP issues in given localities. For example, in the Cardiff area, since 1995 there have been six (Stevens & Associates, 1998). The difficulty is that in terms of their findings and recommendations, "few have been implemented: fewer still have made any significant impact" (Stevens & Associates, 1998:III).

56. In part, this cycle of problem recognised/problem agonised about/strategy devised/failure of strategy to be implemented, reflects the very high degree of institutional fragmentation within the sector. A highly complex matrix of national, regional, local, sectoral and occupational bodies tend to share responsibility, and even where an umbrella organisation emerges (generally at regional or national level) their resource base and power to influence and enforce action tends to remain limited (see L&R Consulting, 1997 for some good examples of this fragmentation at work).

57. Even at the level of national government it is unclear what, if any, systematic co-ordination on training and HRM policies for the sector there is between the DfEE, the DTI (whose Sector Challenge initiative sponsors 'Excellence through People' in the sector), and the Department for Culture, Media and Sports (DCMS) who have supported research and proposed policies on employment and training in hospitality and tourism.

58. In Scotland there is a greater degree of co-ordination via an over-arching national body - Tourism Training Scotland (TTS) which is a joint industry/public sector forum established in 1992 to improve the quantity and quality of tourism and hospitality training Scotland. TTS is charged with developing a vision for the industry and strategies for delivery, acting a s a catalyst for new developments and as a national voice on tourism skills, and with monitoring progress and identifying future challenges. TTS has developed a range of training programmes which are delivered through Scottish Enterprise and Highlands and Islands Enterprise networks. However, even the TTS model has significant weaknesses. It has limited influence on the work of VET providers within the education system and "must drive its own agenda in response to economic, educational and tourism policy directives over which it has little or no influence" (Scottish Tourism Research Unit, 1998:114). Moreover, TTS "notably fail to address in their approach to training....conditions of employment in the tourism industry in general and in the hotels and catering sector in particular" (STRU, 1998:101).

59. For a strong, cohesive and strategic model of sectoral tourism/leisure training in Europe, one must turn to Ireland. Here CERT offers an example of an extremely powerful body able to direct public and private training provision in a concerted fashion (see Appendix 2 for details).

60. One way forward across the whole of the UK would be for government (national, regional and local) to use the relatively high level of subsidy which it channels into this sector to exert leverage over the sector's employment policies. Public money arrives in a variety of forms - capital investment from local, regional and UK governments, the lottery and the EU (for example, in the Cardiff area no less than £600 million of capital expenditure is being invested in new tourist and leisure facilities), via grant-in-aid support of the English Tourist Board and the British Tourist Authority, ESF objective 2 funding, training subsidies in programmes like Modern Apprenticeship, and business start-up funding). Phillimore's study of tourist attractions in Herefordshire found that 57 per cent of the organisations received public funding (from the Rural Development Commission, local government, English Heritage, the Tourist Board, Business Links, and other bodies). Given this level of support, it seems not unreasonable to use this leverage to encourage moves towards greater integration. It might also be possible to tie grants from public monies to leisure sector employers conditional on their securing or moving towards securing IIP status. In the hospitality sub-sector, involvement in the British Hospitality Association's 'Excellence through People' initiative (being supported by the DTI's Sector Challenge Fund) could also be used as a passport 'requirement' for access to public monies.

**Matches between the VET System’s Outputs and Employer Needs**

61. One of the issues that is woven into the literature on this sector is the manifestation of concern by employers as the relevance of much of the education-based VET provision and the weakness of its 'fit' with the real needs of the industry (Brotherton, 1993; Robinson, 1992). For example, the HTF question the wisdom of allowing a situation in which enrolments in GNVQs in Leisure and Tourism in 1997/98 stood at 31,098 whereas enrolments for Hospitality and Catering were just 3,634 at a time when there are far more employment opportunities in hospitality and catering than in tourism (HTF, 1998:20). Moreover, the kinds of skills developed via a GNVQ in Leisure and Tourism are very different from those actually required by employers in the sector and there are concerns about the breadth and depth of industry input into the design of such courses.

62. These problems are the result of the interplay of a complex range of factors, which cannot be reviewed here in detail. None the less, some deserve mention. One is student choice, which educational funding systems now use as the main engine of resource allocation within and between education institutions. Another is cost. As the HTF admit, the practical element of hospitality and catering GNVQs renders them far more expensive to teach than leisure and tourism (HTF, 1998:20).

63. It is also unclear whether educational courses of a vocational or semi-vocational nature should be seen as fitting people solely for the particular sector or occupation that is the subject of study. Given constant changes in the economy and the under employment problems touched on above, such an approach would be detrimental to the interests of individuals, who, in the case of higher education at least, are paying an increasing proportion of the costs of the education. On the basis that the labour market decides the value of any qualification, what seems important as a measure of success in educational provision is whether those who study for qualifications relevant to the sector find employment, whether in the sector or not. In other words, unemployment or low private rates of return would be the best measure of a mis-match about which policy makers should be concerned. As Purcell and Quinn report in relation to hotel and catering degrees and HNDs "all but a tiny minority of graduates appear to find employment, whether or not in the hospitality industry, and the knowledge and skills acquired during their higher education appears to be more highly rewarded by industries other than hospitality" (1996:66).

64. Another problem is that even where students do opt to follow courses that are relevant to employers in the sector as a whole (whether in tourism and leisure, or hospitality and catering) research evidence (Purcell and Quinn, 1996; Getz, 1994) suggests that the work experience elements of the courses have a negative effect upon career intentions and tend to result in students opting for careers in other sectors. Getz, in his study of the tourist industry in Speyside, goes further, arguing that "despite high levels of direct experience of working in the industry (especially for females), and high levels of parental involvement, careers in tourism and hospitality have a bad and worsening image. Students want to go on to higher education and enter professions, and prefer out-migration to looking for work in the Spey Valley. Jobs in tourism and hospitality are largely perceived to be undesirable" (Getz, 1994:35).

65. Moreover, research also suggests that mismatches between educational provision and the sector may be reflected in the under-employment of those more highly qualified entrants that the sector can attract. Purcell and Quinn's survey of graduate and HND entrants to the hotel industry suggest that nearly half of recent graduate entrants and more than half of HND entrants felt that they were employed in jobs that did not require higher education qualifications (Purcell and Quinn, 1996). While some employers appear concerned that the HE system is not providing them with what they need, they in turn do not always seem to be putting the human capital created by a publicly funded HE system to best use.

66. Finally, it is important point to note that these difficulties take place against the backdrop of a relatively weak work-based training arrangements for young entrants in many parts of the sector. If a vibrant and successful work-based route existed, employers would have the option of 'doing it their way' rather than having to rely upon the education system to second guess their requirements. In many ways the Leisure sector and its constituent parts reflect the wider reality that, with the partial failure of YT(S) to deliver a mass, high-quality work-based route, policy makers have generally opted to pursue vocational preparation and training through courses delivered via the education system. The expansion of higher and further education has been the chosen alternative to making further efforts to develop and sustain mass provision of work-based VET for the young. To put it another way, GNVQs are the price to be paid for the failure of YTS.

67. As a result, boosting full-time participation in post-compulsory education has come to be seen as one of the main indicators of success in national VET policy. With the exception of Modern Apprenticeships, work-based training for the young has come to be seen largely as social provision which is primarily of use to those who for one reason or another are incapable or unwilling to carry on with studies within the education system. Modern Apprenticeships, while welcome, are liable to have only a limited impact. At present, MAs have not been able to reach its initial, fairly modest, intake targets and by the year 2000 will still represent only around 10 per cent of the 16-18 cohort. In some parts of the Leisure sector, particularly Sports and Recreation, and Travel Agencies, MAs have performed well and have recruited significant numbers. In other parts, such as Tourism, the figures are very poor.

68. There is not the space here to review in any detail the complex issues and debates that surround the relative merits of post-compulsory education and work-based training, but it seems to us that there are important questions to be asked about whether the current reliance on education-based provision of VET for the young is well-founded. At the very least, it would appear worth posing the question of whether a pound spent on providing an intermediate level GNVQ in Leisure and Tourism in a school sixth form will produce a higher or lower rate of social return than a pound invested in work-based provision leading to an NVQ level 3 in tourism. To the best of our knowledge, such calculations do not appear to have been attempted.

**Conclusions**

69. We would argue that attempting to take skills as the starting point for a major upgrading the performance of this sector would be misplaced. This sector's long-standing skill problems are the consequence of wider factors that need to be addressed if significant and lasting improvements in the demand for and utilisation of skills are to occur. A necessary pre-condition therefore for the effective utilisation of enhanced levels of skills among the broad mass of the workforce would be development of better people management systems and practices and approaches to work organisation that allowed for significant levels of job enrichment.

70. It is also unclear what would impel much of the sector to want to become ‘world class’. International tourism inflows into the UK tend to be focused on quite tightly bounded geographical locations (in England - London, Oxford, Warwick/Stratford-upon-Avon). Wales sees relatively few international visitors. For tourist attractions and hotels in areas of the country where overseas visitors are few, much of the competition is for a regional pool of day trippers and competition here may be a zero sum game. If one is running a museum in rural Herefordshire or a hotel in mid-Wales, the market is a domestic and regional one, and tendency will be to see the competition as other local operators. Unless ways can be found to attract overseas visitors to parts of the UK where they have hitherto been rare, the spur applied to the sector by international competition will remain at best patchy.

71. There is an important series of questions to be posed about how wider change in the sector is to be achieved. The National Skills Task Force has already suggested that "we think it would be a mistake to treat the current demand of employers and individuals for skills as coterminous with the needs of the economy (NSTF, 1998:33). However, if skills over and above what employers and individuals currently believe are necessary (and are therefore willing to invest in) are the desired goal, new incentives, levers and institutional mechanisms may be necessary. The Leisure sector would appear an area of employment where the problems of any such approach are liable to be acute. At the moment large segments of the sector are trapped in competitive strategies and people management practices that promote a low demand for skills. Given the structure of domestic demand, how can external intervention change this, except at the margins, and would the types of intervention required by politically acceptable?

72. Potential avenues to change might take the form of quality initiatives to boost standards (as has taken place in the outdoor pursuits sector as a result of concerns about safety), or through consumer education aimed at making the domestic consumer more discriminating and demanding. This would undoubtedly take time to have a major effect, but could produce significant changes in the longer term.

73. Moreover, if better skills are simply one element located within a much wider and more complex matrix of changes that need to take place in order to produce the desired 'world class' sector then the task of orchestrating the required action becomes an exacting one. Given the multiplicity of often relatively weakly resourced bodies who have a responsibility for VET within the sector co-ordinated action even on this limited front is problematic. Attempts to upgrade product market strategy, improve marketing, set up better and more sophisticated people management systems, and change work organisation and job design would require the involvement of other agencies, the identity of which is unclear within the UK context.

74. The problem can be posed in a series of questions, the answers to which are not readily available:

1). If a major upgrading of the strategic and operational capacity of the UK's leisure sector is to be undertaken, who owns the problem and responsibility for the required action?

2). Who can develop the vision, transmit it to the very heterogeneous and fragmented audience in the sector and secure their active participation in its delivery?

3). What institutional structures currently exist that could develop answers to questions 1 and 2 above?

4). What motivational levers and incentives are available to support such a strategic change? Are market forces (as currently configured) and exhortation enough? If not, what other forms of intervention might be required and by whom should they be undertaken?

75. Willing the ends is relatively easy. Willing the means is significantly less so given the institutional landscape with which we are confronted. Even the kinds of far more limited measures we are suggesting to address specific skills deficiencies set a demanding agenda given the structural environment in this important sector of the economy.

**APPENDIX 1**

**TECs, NTOs and Lead Bodies contacted in the course of this research:**

All TECs

Scottish Enterprise

Industry Lead Body for Amenity Horticulture

METIER

Caravan Industry Training Organisation

Hospitality Training Foundation

LANTRA NTO

Voluntary Sector NTO

Museum Training Institute

SPRITO

Information and Library Services Lead Body

The Travel Training Company

**APPENDIX 2**

**CERT**

Founded in 1963, CERT is the state agency responsible for the recruitment, education and training of staff at all levels in the Irish hotel, catering and tourism industry. The body formulates education and training policy and then implements it. CERT runs its own training centres and hotel schools, as well as co-ordinating provision in public sector educational institutions. It is overseen by a board made up of representatives from employers, trade unions, educational institutions, and government departments and agencies.

CERT offers advice to government on all aspects of HRD and its functions include:

1. Human resource planning and identification of training needs and the development of national training structures and programmes.
2. Recruitment, training and formal education of school leavers preparing for careers in the industry.
3. Provision of on-the-job and specialist training services to existing employees and proprietors (including co-ordinating their certification).
4. Provision of advisory and business development services to the industry.
5. Training for unemployed people to enhance their prospects of finding work in the hotel, catering and tourism industry.

Baum (1995) comments:

The Irish model is unique [in Europe] in that it provides

by far the most comprehensive approach to co-ordinating

the inputs of education and the tourism industry into a

unified system and, through CERT, operates through total

co-ordination and the identification of training and

development needs at both the micro and macro levels.

And the Scottish Tourism Research Unit argue that "the benefits of the Irish system and its investment over a period of 35 years is less in the institutional arrangements that it has spawned or the specific initiatives that are in place and is much more reflected in a training culture at all levels in the public and private sector in Irish tourism" (1998:13).

This Appendix is based on Baum, 1995; Amoah and Baum, 1997; and Hjalader and Baum, 1997.

**APPENDIX 3**

**THANKS**

We would like to record our thanks to those who have helped us in preparing this paper. Many staff in the TECs took the time to write us quite lengthy commentaries on the sector in their locality, as well as forwarding us a wealth of local and regional labour market information and intelligence. Scottish Enterprise sent us much useful information, as did those NTOs that responded to our requests for data on the sector.

A large number of academics involved in the TOLERN network provided us with material, references and useful comments on our research. In particular, we would like to thank Dr Kate Purcell, Professor Tom Baum, Professor Roy Wood, and Dr Dennis Nickson for the time they spared us to discuss our paper.

Last, but not least, our thanks goes to Helen Davies, who acted as research assistant to the early stages of the work.

As ever, responsibility for any errors and omissions in this paper rest with the authors.

**REFERENCES**

Amoah, V. A. and Baum, T. 1997. 'Tourism education: policy versus practice', *International Journal of Contemporary Hospitality Management*, Vol 9, No 1, 5-12.

Baum, T. 1995. *Managing Human Resources for the European Tourism and Hospitality Industry: A Strategic Approach*, London: Chapman and Hall.

Baum, T. and Nickson, D. 1998. 'Teaching human resource management in hospitality and tourism: a critique', *International journal of Hospitality Management*, Vol 10, No 2, 75-79.

Brotherton, R. 1993*. Hospitality Management Education and Graduate Training in Britain and Europe*, Blackpool: Blackpool and Fylde College.

Commission for Racial Equality. 1991. *Working in Hotels*. London: CRE.

Commission on Industrial Relations. 1971*. The Hotel and Catering Industry, Part 1: Hotels and Restaurants*, London: CIR.

Department of National Heritage. 1996*. Tourism: Competing with the World's Best. No 3 - People Working in Tourism and Hospitality*, London: DNH.

Family Holiday Association. 1999. *Annual Report, 1997/98*, London: FHA.

Frayman, H., Mack, J., Lansley, S., Gordon, D., and Hills, J. 1991*. Breadline Britain in the 1990s: The Findings of the Television Series*, London: London Weekend Television.

Getz, D. 1994. 'Students' work experiences, perceptions and attitudes towards careers in hospitality and tourism: a longitudinal case study in Spey Valley, Scotland', *International Journal of Hospitality Management*, Vol 13, No 1, 25-37.

Greater Nottingham TEC. 1998*. Greater Nottingham TEC Labour Market Report 1998/99*, Nottingham, GNTEC

Gregg, P., Harkness, S., and Machin, S. 1999*. Child development and family income*, York: Joseph Rowntree Foundation.

Guerrier, Y. and Lockwood, A. 1989. 'Core and Peripheral Employees in Hotel Operations', *Personnel Review*, Vol 18, No 1, 9-15.

Hands, D. 1995. ‘Tourism and Leisure in Norfolk and Waveney - A Management Summary’, Birmingham: BMG (mimeo).

Hjalager, A-M., and Baum, T. 1998. ‘Upgrading human resources: an analysis of the number, quality and qualifications of employees required in the tourism sector’, Glasgow, Scottish Tourism Research Unit, unpublished paper, (mimeo).

Hospitality Training Foundation. 1998. *Skill Shortages, Labour Turnover and Recruitment in The Hospitality Industry, - a report to the National Skills Task Force*, London: HTF.

Howarth, C., Kenway, P., Palmer, G., and Street, C. 1998*. Monitoring Poverty and Social Exclusion: Labour's Inheritance*, York: Joseph Rowntree Foundation.

L&R Consulting. 1997. ‘North Wales Borderlands TOurism Development Project Stage 1: Final Report’, Liverpool: L&R Consulting (mimeo).

Lynch, P. A. 1994. 'Demand for training by bed and breakfast operators', *International Journal of Contemporary Hospitality Management*, Vol 6, No 4, 25-31.

Millward, N. et al. 1992. *Workplace Industrial Relations in Transition*, Aldershot: Dartmouth.

National Economic Development Office. 1992. *UK Tourism: Competing for Growth*, London: NEDO.

National Skills Task Force. 1998. *Towards a National Skills Agenda*, Sudbury: DfEE.

Phillimore, J. 1997. 'Employment, skills and training in rural tourist attractions', *CURS Discussion Paper*, University of Birmingham: Centre for Urban and Regional Studies.

Price, L. 1994. 'Poor Personnel Practice in the Hotel and Catering Industry: Does it Matter?', *Human Resource Management Journal*, Vol 4, No 4, 44-62.

Prism Research Ltd. 1997. ‘The Tourism Industry - a report prepared for SkillsLink West’, Bristol: Western Training and Enterprise Council (mimeo).

Purcell, K. and Quinn, J. 1996. 'Exploring the education - employment equation in hospitality management: a comparison of graduates and HNDs'*, International Journal of Hospitality Management*, Vol 15, No 1, 51-68.

Mulvaney, J. 1999. Personal communication in response to our letter to TECs, Merseyside TEC.

Robertson, S. 1992. 'The Learning Curse', *Inside Hotels*, 40-45.

Scottish Tourism Research Unit. 1998. ‘International Benchmarking and Best Practice Study of Training and Education for Tourism’, Glasgow, University of Strathclyde, unpublished paper, (mimeo).

Shaw, G., and Williams, A. 1994*. Critical Issues in Tourism: a geographical perspective*, Oxford: Blackwell.

Stevens and Associates. 1998. ‘Tourism Employment Action for the Millennium - A Tourism and Hospitality Training Strategy’, Final Report, Cardiff: South Glamorgan TEC (mimeo).

Tourism Training Scotland. 1998*. Straight to Business - A Strategy and Action Plan for the New Millennium*, Glasgow: TTS.

Wood, R. 1992.  *Working in Hotels and Catering*, London: Routledge.

Yale, P. *Tourism in the UK*, Huntingdon: ELM Publications.