

## SECTOR REVIEW OF QUALIFICATIONS AND THE QUALIFICATIONS SYSTEM IN

# TRAVEL, TOURISM, HOSPITALITY AND CATERING

March 2023



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## Foreword

### **Philip Blaker, Chief Executive, Qualifications Wales**

Travel, tourism, hospitality and catering are all important parts of the Welsh economy, employing thousands of people and generating billions for the economy. They build on the natural assets that Wales has in its wonderful landscapes and food provenance.



This review was in part undertaken during the depths of the COVID-19 pandemic, when public health protections effectively prevented the sectors from operating. Things have clearly improved on this front, but the sector still faces considerable challenges – for example, the cost of energy and living crisis, and impacts arising from Brexit. In particular, we have heard concerns about staff shortages and recruitment, and trading conditions moving forward. Taken together, these have presented three extremely challenging years for the sector.

Given these conditions, I am particularly grateful for the support that we have received from those working in the sector while conducting the review. The sector is in recovery and we hope that our work can help in this process.

Our role as the independent regulator for non-degree qualifications is underpinned by our principal aims to ensure that qualifications in Wales meet the reasonable needs of our learners and carry public confidence. With this in mind, the review has identified numerous strengths in qualifications in the sector, including the opportunities available for practical learning, real-life experiences outside of the traditional classroom environment and exciting career prospects. Nevertheless, there are issues that need addressing. These primarily relate to the currency of content and assessment of the qualifications currently offered in Wales and the limited availability of Welsh-medium qualifications.

While we have considered travel, tourism, hospitality and catering as one sector for the purpose of this review, it has become clear that there are differences in the actions that we need to take. We are, therefore, proposing to take different actions for travel and tourism to those for hospitality and catering. In the spring of 2023, we will be consulting on our proposals for hospitality and catering where the actions we are proposing are more significant in nature.

I would like to thank all who have been involved in this review. We always seek to gain a broad range of views from employers, sector bodies, providers and learners in our reviews, and during these recent challenging times we are particularly grateful for the contributions made.

# Chapter 1: Introduction and executive summary




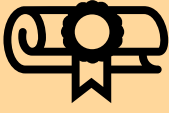

**Lisa Mitchell, Qualifications Manager, Qualifications Wales**

**In this chapter, we introduce the sector review and summarise its findings.**



1. Welcome to our report on our sector review of qualifications, and the qualifications system, in Travel, Tourism, Hospitality and Catering. This is the fifth and final of the phase 1 sector reviews carried out by Qualifications Wales, the regulator of qualifications, other than degrees, in Wales. In sector reviews, we take a cross-cutting look at the qualifications in a particular employment sector, to see if the needs of employers and learners in that sector are being met. We also look at the underpinning qualifications system, including the way that different organisations work together to deliver those qualifications. We focus primarily on qualifications that are eligible for use on publicly funded programmes of learning for learners under the age of 19 – those taken in secondary schools and further education colleges, and as part of apprenticeship programmes. However, if we discover issues with other relevant qualifications, we take those into account too.
  
2. The report is structured as follows:
  - **Sector context** – Richard Bond, a key advisor to the review, outlines features of the sector that are particularly relevant to the review
  - **Methodology** – we outline how we conducted the review
  - **Findings** – we outline the findings of the review in relation to:
    - the overall qualification offer
    - the content and currency of qualifications
    - the assessment of qualifications
    - the wider qualifications system
    - our international review
  - **Actions we will take** – we outline the actions that we will be taking to address the issues identified by the review
  
3. In sector reviews, we consider whether:
  - The **range** of qualifications available in the sector is appropriate and sufficient
  - The provision of **Welsh-medium** assessment is sufficient
  - The requirements of **learners, learning providers and employers** are being met, and are likely to be met, in the foreseeable future
  - The **knowledge, skills and understanding** requirements of qualifications reflect current knowledge and best practice
  - The **assessment** arrangements for qualifications are effective
  - The qualifications are **comparable** with similar qualifications
  - The **qualifications system** is effective in supporting qualifications in the sector

4. We addressed the questions posed by the review through a series of workstreams, including detailed stakeholder interviews, focused discussion groups with learners, an online questionnaire, a technical review of qualifications and an international review. We used evidence from each of these workstreams to inform the findings that are presented in this report.

Stakeholder engagement	Learner engagement	Online questionnaire	Technical review	International review
145 interviews	279 learners	140 responses	27 qualifications	5 countries
				

5. In relation to the **overall qualification offer** for the Travel, Tourism, Hospitality and Catering sector, the review identified the following:
- When discussing travel and tourism qualifications, stakeholders generally felt that the range of qualifications available was suitable. However, employers told us that they were not familiar with the qualifications being offered in secondary schools and further education colleges.
  - Hospitality and catering employers felt there was a lack of qualifications available for some front-of-house roles, such as reception and housekeeping. They also told us that a qualification with optional front-of-house routes, enabling learners to transfer between roles, would be useful.
  - The value placed upon qualifications in this sector was different compared with some of the other sectors that we have reviewed. Generally speaking, qualifications in this sector, particularly within travel and tourism, did not serve as 'a licence to practise' as they were not a requirement for employment.
  - The importance of developing high-quality customer service skills and embedding these skills within qualifications in this sector was expressed by many employers and by representatives from learning providers.
  - Learning providers noted that there are limited options for learners to undertake qualifications in this sector through the medium of Welsh.
  - Secondary schools, in particular, expressed concern about the lack of quality continuing professional development (CPD) training available through the medium of Welsh for teachers. We were also told that the resources at Welsh-medium CPD events are often either only in English or are not of a comparable standard to the English-medium resources.
  - In post-16 education, the reasons given by learners for choosing qualifications in travel and tourism were different to those in hospitality and catering.
  - It was noted by stakeholders that travel services apprenticeship frameworks mostly feature business administration or customer service qualifications rather than competence-based sector-specific qualifications. They also explained that there are very few opportunities for learners to undertake the travel services apprenticeship frameworks.

- In contrast, there were many hospitality and catering apprenticeship pathways and opportunities, and employers often spoke highly of the value of apprenticeships within the sector while suggesting that the number of hospitality and catering apprenticeship pathways could be streamlined.

6. In relation to the **content and currency of qualifications** in the sector, the review identified the following:

- Stakeholders generally spoke positively about qualifications in travel and tourism, expressing the view that they were broadly fit for purpose. However, there was also a view that the qualifications would benefit from being updated and refreshed to meet the current industry needs.
- The lack of Welsh context was also mentioned, with concerns that learners were progressing to employment with a limited awareness of the industry in Wales. Stakeholders also emphasised that it is important for qualifications to reflect the range and variety of highly skilled jobs which are available.
- Learning providers delivering travel and tourism qualifications often offered qualifications from more than one awarding body. This was to meet the needs of different learner profiles, with several learning providers offering Pearson BTECs as an academic route (for progression to university) and City & Guilds or NCFE qualifications as a vocational route (for progression into apprenticeships or employment).
- Sustainability, using digital technology and experiential tourism, were highlighted as topics that stakeholders felt should be introduced into all qualifications to reflect modern industry.
- Many hospitality and catering stakeholders felt that some of the content covered by the current qualifications is not relevant to industry today and that some potential content is missing. They were keen that the qualifications should be reviewed to allow for more involvement from industry in their design and delivery. They felt that this would make the qualifications more relevant to Wales.
- Employers pointed out that the current hospitality and catering qualifications are almost ten years old and do not reflect the significant changes brought about by developments such as digital technology and the impact of the COVID-19 pandemic.
- Learning providers also expressed concerns that the qualifications included within hospitality and catering apprenticeship frameworks were outdated and do not reflect the current industry trends and needs or include modern culinary methods and techniques.
- Employers and representatives from further education colleges also suggested that there should be more integration between front-of-house and back-of-house qualifications.
- Many learners talked about how they prefer practical learning rather than written theory work and how they often learn better through hands-on, practical tasks.

7. In relation to the **assessment of qualifications** in the sector, the review identified the following:
- Stakeholders had a range of different views about the assessment of travel and tourism qualifications. While some subject leaders in further education colleges told us that they felt assessment was generally fit for purpose, others had concerns that the number of written, theory-based assessments that learners need to complete was excessive.
  - In relation to travel and tourism qualifications, particularly at level 3, feedback from representatives from further education colleges and the findings of our technical review suggested that there are inconsistent levels of demand between different awarding bodies' qualifications, with some qualifications being viewed as more demanding than others.
  - Several further education college subject leads told us they had decided to move from one awarding body to another due to the challenging nature of the assessments and introduction of examinations in travel and tourism qualifications.
  - However, further engagement found that the less demanding qualifications even though they were less challenging could be overly prescriptive and less effective at preparing learners well for higher education.
  - A number of learning providers delivering hospitality and catering qualifications felt that there is simply too much assessment, which puts pressure on learners and reduces the amount of time available both for teaching and for learners to practice and refine skills.
8. In relation to the **wider qualifications system**, the review identified the following:
- The impact that the COVID-19 pandemic had on the sector has been staggering. As has been widely reported in the media, this was an extremely challenging time for the industry. The sector had not only experienced a recruitment crisis but was having to continually adapt to changing customer needs and expectations.
  - Many employers, learning providers and learners told us about the importance of work experience and how much they valued opportunities to learn in a hands-on, real-life environment. The COVID-19 pandemic had a significant impact on opportunities for work experience across both travel and tourism, and hospitality and catering.
  - We were told by stakeholders that more could be done, particularly by schools and careers advisors, to raise awareness of the sector and promote the opportunities that are available. Many employers expressed strong views around negative and outdated perceptions of the industry that persist, such as it being low skilled and involving long hours and low pay. Employers also felt that apprenticeships within the sector could be promoted more effectively by secondary schools.
  - When discussing their equipment and facilities for hospitality and catering qualifications, most representatives from further education colleges told us that they generally have the appropriate resources needed to deliver the qualifications effectively. However, through our stakeholder engagement it became clear that secondary schools do not have access to the same standard of

equipment as further education colleges when delivering hospitality and catering qualifications.

- Both representatives from further education colleges and secondary schools shared concerns around the cost of delivering hospitality and catering qualifications, referencing the increase in the price of food ingredients.
- Several secondary school teachers delivering travel and tourism qualifications also told us that they would like to see more teaching resources, such as textbooks and exemplar materials.
- When asked about their challenges and concerns, a number of learning providers, particularly those in secondary schools, told us that recruiting and retaining specialist travel and tourism and hospitality and catering teachers was a key issue.
- Overall, there were few issues raised around access to CPD for teachers of both travel and tourism and hospitality and catering.
- Several larger companies, such as Bluestone and Compass Group, have developed their own hospitality academies that offer work-based learning opportunities, work experience and outreach programmes. This is an aspect of the sector which is different from many of the other sectors that we have reviewed, where training tends to be external.



### Our response to findings of the review

9. In Chapter 9 of this report, we set out the actions we will be taking to address the issues raised by the review. We explain how we think the actions set out in the report could strengthen the qualifications offer and address the issues raised while building on the strengths of the sector.
10. The actions we have taken, and propose to take, are set out in the table 1. We have already begun to implement some of the actions through our *Qualified for the Future* project, which is looking at qualifications for 14 to 16-year-olds and working with awarding bodies and stakeholders on the immediate challenges and opportunities. In table 1, we summarise the actions that we propose to take. In Chapter 9, we outline our considerations when deciding on each course of action.



**Table 1: Summary of Qualifications Wales' actions.**

Action	
<b>1.</b>	<p>Through our <i>Qualified for the Future</i> project, we are developing requirements for a range of new qualifications, including GCSEs, for learners aged 14 to 16. Key actions relevant to this review include:</p> <ul style="list-style-type: none"> <li>• Introducing a new <b>GCSE Food and Nutrition qualification</b>, which will support learners to understand the journey of food and drink 'from field to fork', as well as to develop a range of practical cooking skills</li> <li>• Exploring opportunities for proposed content in <b>GCSE Geography and GCSE Business</b> to include areas of tourism such as sustainability and Welsh urban and rural tourism.</li> </ul>
<b>2.</b>	<p>As part of our <i>Qualified for the Future</i> work, we are reviewing the full 14 to 16 offer of qualifications, including GCSEs and a wide range of other qualifications, to meet the needs of all learners aged 14 to 16. We are proposing that there should be:</p> <ul style="list-style-type: none"> <li>• entry level, level 1 and level 2 pre-vocational qualifications in <b>travel and tourism</b> as part of the Full Offer for learners aged 14-16.</li> <li>• entry level, level 1 and level 2 pre-vocational qualifications in <b>hospitality and catering</b> as part of the of the Full Offer for learners aged 14-16.</li> </ul>
<b>3.</b>	<p>We will introduce a set of high-level approval criteria for the development of priority, unrestricted approved <b>travel and tourism qualifications</b> to replace the qualifications that we identified are in need of updating. The new approval criteria would require awarding bodies to demonstrate:</p> <ul style="list-style-type: none"> <li>• that the qualification content is <b>up-to-date and relevant</b> (including Welsh context and customer service units)</li> <li>• that the qualification content reflects <b>the needs of industry</b> and, where relevant, that the views of industry have been considered during the development and/or review of the qualification</li> <li>• that they have considered, and sought to overcome, the issues identified by the review in relation to <b>assessment</b></li> <li>• that they are available for learners to take <b>in Welsh as well as in English.</b></li> </ul>
<b>4.</b>	<p>We are proposing to consult in the spring of 2023 on our proposal to commission a new suite of priority, restricted approved <b>hospitality and catering qualifications.</b></p> <p>By commissioning a new suite of qualifications, we would hold a market competition to select a single awarding body to develop bilingual Made-for-Wales qualifications. We will be seeking views on this proposal in our consultation.</p>
<b>5.</b>	<p>To review the <b>level 3 provision in Food and Nutrition</b> to be part of Qualifications Wales' wider review of level 3 qualifications to follow the work of the <i>Qualified for the Future</i> project.</p>
<b>6.</b>	<p>We will continue to prioritise, for our <b>Competitive Welsh Language Support Grant</b>, qualifications in full-time programmes of learning for learners aged 14-19 and apprenticeships, and will continue to encourage</p>

	awarding bodies who develop new or replacement qualifications in the sector to apply for this grant.
7.	Qualifications Wales will share with Careers Wales the findings of the review relating to the provision of <b>careers advice</b> to learners.
8.	We will share the evidence of the review with Welsh Government, ColegauCymru and other relevant bodies, and bring to their attention the findings of the review relating to: <ul style="list-style-type: none"><li>• the need for greater <b>awareness of careers</b> in travel, tourism, hospitality and catering, particularly in schools</li><li>• suggestions that the <b>hospitality and catering apprenticeships</b> should be reviewed (including the entry requirements of apprentices, access to funding, the required length of apprenticeships and the range of experiences that learners needed to cover)</li><li>• the need to encourage links between <b>the industry</b> and learning providers</li><li>• the challenges of <b>recruiting and retaining</b> specialist teachers, particularly in schools and further education.</li></ul>



## Chapter 2: The sector in context

**In this section, Richard Bond, one of our sector experts who worked on the review, provides an introduction to the Travel, Tourism, Hospitality and Catering sector in Wales.**



*Richard has worked in the UK hospitality sector for more than 28 years and within Wales for more than 20 years. He has held senior management positions at JD Wetherspoon plc. During this time, he led the Welsh Food and Drink project, which resulted in a standalone, bilingual menu and magazine across 50 JD Wetherspoon sites. Richard also had responsibility for other national company projects, including the back to the floor programme, and worked closely with the launch of their apprenticeship programme in Wales.*

*Richard now works as an independent consultant across a number of projects and sectors, including the Food and Drink Wales Trade Development programme. Richard is also working with Welsh Government on developing the supply of Welsh food and drink within Wales and the UK and internationally.*

### The sector in context

- 11.** The Travel, Tourism, Hospitality and Catering sector comprises an exceptionally broad and complex combination of businesses, ranging from large hotel chains through to smaller, independent restaurants. The sector covers a myriad of services, operations and experiences, from traditional fine dining within the seven Michelin-starred restaurants in Wales to pop-up street food operators serving world cuisine from shared, re-purposed industrial units, such as Depot in Cardiff, or from a mobile food truck, such as Viaduct 1864 in Machen<sup>1</sup>. At the same time, the sector within Wales is also offering premium opportunities such as staying in boutique hotels, alongside glamping in shepherds' huts and pods with outdoor kitchens and bathrooms. There are also exciting tourist experiences to distill your own gin, forage for food, participate in water sports, swim with sharks or zipwire through a disused quarry. The Travel, Tourism, Hospitality and Catering sector is wonderfully rich in terms of its variety and innovation, which presents both opportunities and challenges for the purposes of this review process.
- 12.** Approximately 74,000 people are employed within the Travel, Tourism, Hospitality and Catering sector in Wales, making it the third largest sector, accounting for around 10% of national employment within Wales. The sector employs proportionately more 16-24 year olds than other vocational sectors, as well as more from Black, Asian and Minority Ethnic groups and those with disabilities.<sup>2</sup> Alongside this, the sector adds around £3.6bn to the Welsh economy through gross value added, which has increased – and looks set to increase further – since the COVID-19 pandemic.<sup>3</sup> The potential future value of the sector is significant to Wales both in terms of employment and economic value, as well

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<sup>1</sup> <https://guide.michelin.com/gb/en/article/features/michelin-star-restaurants-in-wales>

<sup>2</sup> <https://gov.wales/sites/default/files/publications/2020-01/welcome-to-wales-priorities-for-the-visitor-economy-2020-to-2025-summary.pdf>

<sup>3</sup> <https://gov.wales/sites/default/files/publications/2020-01/welcome-to-wales-priorities-for-the-visitor-economy-2020-to-2025-summary.pdf>

as its impact upon national strategies concerning the visitor economy, future generations and sustainability.

13. The Travel, Tourism, Hospitality and Catering sector within Wales covers a wide variety of business models and structures, with the majority being micro-businesses (employing under ten people) and small and medium-sized enterprises (SMEs) (employing under 250 people).<sup>4</sup> At the same time, there are many larger businesses, operating at both UK national and international level, operating and employing individuals in Wales. The sector supports jobs and communities the length and breadth of Wales, including coastal and rural communities involving local producers of food and drink.
14. Innovation, dynamism and the ability to effect positive change is, and always has been, key to the Travel, Tourism, Hospitality and Catering sector. From Felinfoel Brewery's race with Buckley's Brewery to produce the world's first can of beer in December 1935,<sup>5</sup> through to the new gin school at Hensol Castle distillery,<sup>6</sup> Wales has a strong track record of development and innovation within the sector. Improving skills in the sector will lift the quality of service and improve users' experiences, providing greater added value to customers and driving further visits and more, and better, jobs across Wales.



### The impact of the COVID-19 pandemic

15. The impact of the COVID-19 pandemic in Wales has been significant for the Travel, Tourism, Hospitality and Catering sector, with a number of businesses being required to close or trade under restrictions, which has hampered the opportunities for growth and development, and brought into question the viability of a number of businesses, many of which have closed and not re-opened. In July 2021, there were 16.4% fewer hospitality venues trading in Wales compared with 2019.<sup>7</sup> Similarly, in July 2021, only 27% of operators were 'very confident' about running a tourism business profitably for the remainder of the year.<sup>8</sup> Despite the support offered by both UK and Welsh governments, it has been an exceptionally challenging time for businesses across the sector.

<sup>4</sup> <https://gov.wales/sites/default/files/statistics-and-research/2022-04/size-analysis-of-businesses-2021-920.pdf>

<sup>5</sup> <https://www.felinfoel.com/little-bit-history/>

<sup>6</sup> <https://www.hensolcastledistillery.com/gin-experiences/gin-making-experience/>

<sup>7</sup> <https://cgastrategy.com/>

<sup>8</sup> [Wales Tourism Business Barometer 2021: Covid-19 Impact Wave 7 Report \(gov.wales\)](https://gov.wales/sites/default/files/2022-04/wales-tourism-business-barometer-2021-covid-19-impact-wave-7-report.pdf)

16. Over the past two years, the Travel, Tourism, Hospitality and Catering sector has come under extreme pressure around recruitment and skills, particularly when recruiting chefs, who are in short supply for a number of reasons, including Brexit, the COVID-19 pandemic and individuals choosing alternative careers during lockdown. This is a trend which has been seen across both the wider UK and Europe, but one which is critical to the effective and sustained recovery of the sector. In May 2022, it was noted that there are approximately 170,000 unfilled vacancies within hospitality across the UK.<sup>9</sup> This is leading to increased pressure and working hours for existing employees with some businesses not being to open and trade full time, i.e. for seven days per week.<sup>10</sup> The impact of the furlough work scheme introduced during the COVID-19 pandemic has also had significant effects on travel and tourism businesses, with 22% currently trying to fill vacancies.<sup>11</sup> As referenced by Welsh Government in its Welsh Tourism Business Barometer review, "It seems that furlough has given many workers time to reflect on how much they really still want a job in the tourism industry, which many now see as not worthwhile because of low pay, antisocial hours or job insecurity."<sup>12</sup> A consequence of the shortages is a number of initiatives to attract more people to choose a career in the sector, such as the national recruitment campaign Hospitality Rising<sup>13</sup> and the Experience Makers campaign led by Visit Wales.<sup>14</sup>

### The future of the sector

17. The impact of the COVID-19 pandemic has seen a transformation in the customer experience. Within hospitality and catering there has been an acceleration in the adoption of technology, driven by a combination of restrictions and customer preferences. The service-led experience has evolved, with customers choosing to order and pay via mobile apps when in venues, as well as choosing to experience more premium experiences at home, with both home delivery services and 'finish at home' meal solutions seeing significant growth and spend within the sector, compared to more traditional formats of supply. Within travel and tourism, the pandemic has led to changes in the experiences of the visitor, for example with young people now wanting to travel and learn from their vacations as they seek to have "unique adventurous experiences such as traveling to remote destinations or challenging themselves both mentally and physically" through experiential tourism.<sup>15</sup> This requires businesses to be even more flexible and dynamic in their operation and to have employees who are able to adapt to constantly changing modes of operation, technological requirements and customer expectations.
18. While the number of visits to, and within, the UK and Wales has decreased in recent years, the overall expenditure on tourism has increased. This suggests that visitors are spending more per head and that, therefore, they may be expecting higher quality

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<sup>9</sup> <https://www.bighospitality.co.uk/Article/2022/05/18/recruitment-remains-major-challenge-for-hospitality-as-171-000-vacancies-recorded-by-ons>

<sup>10</sup> <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/jobsandvacanciesintheuk/july2022>

<sup>11</sup> [Wales Tourism Business Barometer 2021: Covid-19 Impact Wave 7 Report \(gov.wales\)](https://www.wales.gov.uk/wales-tourism-business-barometer-2021-covid-19-impact-wave-7-report)

<sup>12</sup> [Wales Tourism Business Barometer 2021: Covid-19 Impact Wave 7 Report \(gov.wales\)](https://www.wales.gov.uk/wales-tourism-business-barometer-2021-covid-19-impact-wave-7-report)

<sup>13</sup> <https://hospitalityrising.org/wp-content/uploads/Hospitality-Rising-Operator-ROI-May22.pdf>

<sup>14</sup> <https://workingwales.gov.wales/change-your-story/work-in-hospitality-and-tourism>

<sup>15</sup> [YouGov-Travel-Whitepaper-A4-Final.pdf](https://www.yougov.com/whitepaper/yougov-travel-whitepaper-a4-final.pdf)

experiences for their money.<sup>16</sup> This in turn creates a demand for higher levels of standards and service delivery on visit occasions, raising the skill requirements for employees within the sector. Trends also suggest an increased demand for more locally sourced products, which further illustrates the sector's prime position as part of the circular economy in Wales.<sup>17</sup> At the same time, there are a number of inflationary pressures affecting the sector, with energy, key products and raw materials such as cooking oil seeing significant price increases and general availability issues, which puts further pressure on all businesses within the sector.

### Role of education and qualifications within the sector

19. Opening up and showcasing the opportunities within the Travel, Tourism, Hospitality and Catering sector to school age learners is vital to the longevity of the sector. Learners need to be exposed to the wide range of roles available so they can aspire to work within the industry. Qualifications need to support personal and professional development of core and technical skills for education to connect with the sector.
20. In 2019-20, almost 9,000 certificates were awarded to learners in Wales who chose qualifications available in the sector across maintained secondary schools, further education colleges, work-based learning and adult community learning (Table 2). Please note, 2019-20 certifications may have been negatively impacted by the COVID-19 pandemic.

**Table 2: The number of approved/designated qualifications and certifications across provider types in 2019-20**

Level	Number of qualifications in scope	Pre-16 maintained schools	Post-16 maintained schools	Further education	Work-based learning	Total
Entry level	4	5	*	10	0	15
Level 1	21	25	0	485	10	520
Level 1/2	11	3,755	75	70	0	3,900
Level 2	144	10	0	990	1,450	2,450
Level 3	95	0	370	570	975	1,915
Level 4	11	0	0	5	50	55
Level 5	1	0	0	0	5	5
<b>Total</b>	<b>287</b>	<b>3,795</b>	<b>445</b>	<b>2,130</b>	<b>2,495</b>	<b>8,860</b>

Source: Welsh Examinations Database, Lifelong Learning Wales Record

21. Wales is undergoing significant developments to the school curriculum and to support these changes Qualifications Wales is reforming qualifications currently taken by 14 to 16-year-olds.<sup>18</sup> These include GCSEs and vocational qualifications. There is a key opportunity for this sector review to align with the work of the *Qualified for the Future*

<sup>16</sup> <https://cgastrategy.com/>

<sup>17</sup> [https://kam-media.co.uk/return\\_of\\_the\\_pub/](https://kam-media.co.uk/return_of_the_pub/)

<sup>18</sup> [Qualifications Wales / Qualified for the future](#)

programme so that that there will be opportunities to learn about the Travel, Tourism, Hospitality and Catering sector across a number of the areas of learning within the new Curriculum for Wales.

22. Alongside the drive for school and further education qualifications, Wales continues to have a proud tradition of apprenticeships in the sector. The development of apprenticeships should attract learners who may have been interested in studying in a work-based learning setting and can now follow a suitable apprenticeship whilst earning a salary alongside their studies.
23. Being involved in this extensive and detailed review of the sector has highlighted the breadth and depth of the businesses operating across Wales and the wider UK, as well as the energy, passion, dynamism and innovation present within the sector and its people. The outcomes of this sector review present a clear opportunity for us to reshape the qualifications that are offered in this key sector in Wales. Having operated within the sector for the past 28 years, it has been really valuable and rewarding to have been involved with this review process and I look forward to seeing the positive impacts upon those working within the sector in the years to come.



## Chapter 3: Review methodology

**Carly Stamp, Qualifications Officer, Qualifications Wales**

**In this chapter, we outline how we conducted this sector review.**



### Scope and organisation

24. To manage the scale and complexity of the work, we addressed the aims of the review through a series of workstreams; some of these were conducted internally, while others were commissioned to external suppliers. We have drawn together the findings from each workstream to compile this report.
25. The review workstreams were:
  - interviews with stakeholders
  - focused discussion groups with learners
  - an online questionnaire
  - a technical review
  - an international review
26. In each workstream, we focused our attention on qualifications and the qualifications system in the Travel, Tourism, Hospitality and Catering sector.<sup>19</sup> In particular, we focused on qualifications at levels 1, 2 and 3 that were eligible for use on publicly funded programmes of learning for learners under the age of 19 and regulated by Qualifications Wales.
27. We analysed data from the Welsh Government Pupil level Annual School Census (PLASC) and Lifelong Learning Wales Record (LLWR) databases and identified which qualifications had the most certifications in Wales in the 2017/18, 2018/19 and 2019/20 academic years. We used this information to decide which specific qualifications to focus on in each workstream, depending on the aims of that strand of work. However, we were open to hearing views about all qualifications in the sector.

### Stakeholder interviews

28. In this workstream, we conducted in-depth interviews with relevant stakeholders to explore their views about whether qualifications taken by learners and apprentices in Wales were meeting their needs, and the needs of learning providers and employers.
29. The stakeholders we interviewed were representatives from:
  - maintained secondary schools (usually teachers and heads of the relevant departments)
  - further education colleges (usually lecturers and heads of the relevant departments)
  - higher education institutions (usually programme directors and careers advisors)
  - work-based learning providers (usually senior managers, tutors and assessors)





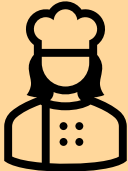

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<sup>19</sup> Sector Subject Areas 7 and 8.



- employers (usually senior managers/directors and training or human resources managers)
- sector bodies from across the two elements of the sector

**30.** In total, we conducted semi-structured interviews with 145 stakeholders (Table 3). Interviews were conducted by three sector advisors and a small team of staff from Qualifications Wales between March and November 2021.

Table 3. Stakeholder sample					
<b>19 secondary schools</b>	<b>30 further education colleges</b>	<b>6 higher education institutions</b>	<b>4 work- based learning providers</b>	<b>67 employers</b>	<b>19 sector bodies</b>
					

**31.** To recruit participants, we used a combination of purposive and convenience sampling strategies, although we were open to speak to anyone who wanted to express their opinion.

- Secondary schools – members of the sector review team identified which secondary schools were delivering relevant qualifications in Wales. We interviewed relevant members of staff from a sample of these secondary schools, making sure that we had a broadly representative spread of regional education consortia, language medium and qualifications offered.
- Further education colleges – we asked our further education sector advisor to identify suitable representatives from further education colleges.
- Higher education institutes – the sector review team identified higher education institutions across Wales who deliver degree programmes in this sector area. The focus of these interviews was to explore the progression routes associated with qualifications regulated by Qualifications Wales.
- Work-based learning providers – the sector review team used Welsh Government’s work-based learning information to identify work-based learning providers across Wales who delivered a range of relevant qualifications to learners on various apprenticeship routes.
- Employers – the sector review team and the Wales Tourism and Hospitality Skills Partnership identified employers from a spread of regional areas across Wales, including both SMEs and large employers. To reach a further range of employers, we also used the knowledge and contacts of our three sector advisors. We continued to identify stakeholders as our engagement progressed.



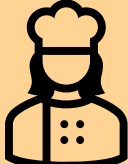
- Sector bodies – we promoted the opportunity to participate in the review to sector bodies at meetings held by the Regional Skills Partnerships, UK Hospitality, Wales Tourism and Hospitality Skills Partnership, National Training Federation of Wales, Visit Wales, Wales Tourism Alliance, Culinary Association of Wales and the hoteliers associations. We strived to ensure that participants had characteristics which would enable detailed exploration of the research objectives. For example, we aimed to have a good representation of sub-sectors, employer sizes and locations in Wales.
32. Most participants were recruited via an email invitation which contained detailed information about the review and the participant’s role in the discussion. Following agreement by participants, confirmation was sent via email, along with an information sheet, consent form, privacy notice and outline of the discussion questions.
  33. All interviews were conducted online via Microsoft Teams. All discussions were conducted using a semi-structured discussion guide, which included a series of substantive questions followed by a few prompt questions that the interviewer could use to help guide the conversation. Prior to each interview, the participants gave written, informed consent. Where the participant agreed, each interview was recorded and fully transcribed. In accordance with the General Data Protection Regulation (GDPR) and Research Ethical Guidelines, all consent forms were stored securely, all participants were made aware of their rights to withdraw at any time and all transcripts were anonymised.
  34. The completed transcripts were split into stakeholder groups: secondary schools, further education colleges, higher education institutions, work-based learning providers, employers and sector bodies. Initially, each group of transcripts was analysed separately. At least two members of the review team independently read each transcript within the group and identified the key themes and sub-themes. To validate the findings, the reviewers then came together to cross-reference and agree the themes and sub-themes. Once all transcripts had been analysed, reviewers came together again to agree cross-cutting themes that emerged across the groups of participants. The principal author of the report read all transcripts. Emerging themes were shared with all members of staff who had conducted interviews in an open process where key findings or assumptions could be challenged and discussed.
  35. As well as conducting interviews, we also convened a Stakeholder Advisory Group with representatives from employers, learning providers and sector bodies. The Stakeholder Advisory Group met online at key points during the review. Members provided a steer for our initial lines of enquiry and were a sounding board when we were developing our thinking around the options we could take, based on the emerging findings of the review. A list of our Stakeholder Advisory Group members is included in the acknowledgements section at the end of the report.

## Learner focus groups

36. This component of the review was commissioned to a research and evaluation consultancy – Strategic Research and Insight (SRI). They held 45 focus group discussions with 279 learners who were studying for 22 different level 1, 2 or 3 qualifications from a range of awarding bodies.
37. The focus groups were conducted in 21 schools, nine further education colleges and two work-based learning settings between March and May 2022. The sample consisted of learners from across the qualifications of interest, different setting types, a range of geographical locations, and English-medium, Welsh-medium and bilingual schools.
38. We have published the executive summary of [SRI's findings](#) from the learner focus groups alongside this review. This provides further details about this work.

## Online questionnaire

39. To supplement the information gathered through our learner and stakeholder engagement, and to give anyone who had not already participated the opportunity to do so, we published an online questionnaire.
40. The questionnaire consisted of qualifying questions to determine the demographic of each respondent followed by a series of closed, Likert scale questions, that focused on the aims of the review. Each closed question was accompanied by an open-ended question that enabled the respondent to explain their responses. The questions were adapted for each target audience group: learners, learning providers or employers.
41. The online questionnaire was open for 23 weeks between June and October 2021. We received 140 responses as shown in Table 4.

Table 4. Online questionnaire responses		
<b>70 learners</b> 	<b>48 learning providers</b> 	<b>22 employers</b> 

## Technical review

42. The review team, supported by our four sector advisors, who have a range of subject, industry and assessment experience, conducted a technical review of qualifications in the sector. We selected, for review, 27 of the level 1, 2 and 3 qualifications with the highest number of certifications in Wales. The qualifications were delivered within secondary school, further education and work-based learning settings in Wales (a full list of the qualifications reviewed is included in Appendix 1).

43. In September 2021, we asked the seven relevant awarding bodies to provide copies of the most current qualification specifications, sample assessment materials (SAMs), standardised assessments, guidance documentation and three examples of learner work for each of the 27 selected qualifications.
44. The technical review team attended a half-day induction in November 2021 to prepare for the technical review. They then reviewed qualification specifications, SAMs and quality-assurance documentation during a week of remote working, before reviewing learners' assessed work over a three-day period at the Qualifications Wales office in December 2021. During these three days, reviewers also shared and compared their findings with other reviewers and the review team. Each reviewer submitted a summative report for each qualification they reviewed, outlining their conclusions relating to the currency of qualification content, the appropriateness of assessment methodologies and the robustness of quality-assurance processes.

### Support from the Next Tourism Generation Alliance (NTGA)

45. The Next Tourism Generation Alliance (NTGA) is a European partnership and alliance for improving collaboration between education and industry. Funded by the European Commission, NTGA commissioned a research project looking into the skills gaps of tourism and hospitality learners. Cardiff Metropolitan University was one of the partners involved in this research. As a result of the research, a toolkit of future skills needs was developed in relation to the following:
  - **Digital/technological:** online marketing, data analytics, use of AI, robotics, mobile technology, virtual reality applications, social media
  - **Green:** resource management (recycling, waste, water and energy), local procurement and sustainable products and services, awareness raising of environmental issues
  - **Social:** behavioural and practical attitudinal competences in interpersonal communication, accessible tourism knowledge, gender equality, cross-cultural understanding, diversity, social inclusion and customer service.

NTGA then reviewed a range of regulated qualifications to determine the extent to which these skills needs were being addressed. The resultant toolkit was of considerable help to the Review Team when considering the coverage of skills in travel and tourism qualifications.<sup>20</sup>

46. We are grateful to members of the NTGA for their support throughout our Review.

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<sup>20</sup> [NTG Toolkit – NTG \(nexttourismgeneration.eu\)](https://nexttourismgeneration.eu)

## International Review

47. We commissioned one of our sector advisors to complete an international comparison study exploring how other countries structure, deliver and assess qualifications in the sector. The purpose was to identify practices that could be considered for Wales.
48. The countries included in the study were the Republic of Ireland, Scotland, Australia, New Zealand and Canada. These countries were selected due to them being similar to Wales with a mix of both urban and rural tourism. These countries are English-speaking nations so information was easier to access, and they have similar climates and/or breadth of types of tourism and hospitality. The Republic of Ireland and Scotland were also part of Cardiff Metropolitan University's Next Tourism Generation Alliance Project and, as European countries, were identified as being a good starting point for the sector review team to begin their desk-based review before moving on to countries further afield.
49. Prior to the international review report being drafted, the sector review team gathered data for the report through a combination of nine semi-structured telephone interviews with key stakeholders in each country and a desk-based review of publicly available documents outlining national economies, education systems and qualification models relevant to the sector.
50. The international review report also provides a summary of the matrix developed by Cardiff Metropolitan University's Next Tourism Generation Alliance Project to identify future skills needed for the Travel and Tourism industry.
51. You can read a detailed methodology, including an outline of the lines of enquiry, in the [full report](#) published alongside this review.

## Methodological considerations

52. Although it was not possible to engage with everyone, we are confident that, by conducting multiple strands of engagement, we have been able to secure a sample that has represented the overall views of the sector. As with previous reviews, it has been encouraging that there has been a high level of consistency between the findings emerging from the different workstreams.
53. Despite the high level of consistency between different workstream findings, we are aware that we may have introduced some personal or organisational bias into the process of interpreting the data. To counter this, we held over 30 workshops with key stakeholders towards the latter stages of the review. In these workshops, we tested lines of inquiry, emerging findings and potential solutions. We also engaged with key awarding bodies in the sector and the further education college pan Wales group on emerging findings and potential solutions. We were encouraged that this programme of engagement elicited strong recognition of the issues we had identified and clear support for our proposed actions.

54. The review was conducted during the second year of the COVID-19 pandemic. In preparation for this, all planning and development meetings conducted between the sector review team and sector advisors were held online. All interviews and meetings with stakeholders were held online, as we were not able to conduct any face-to-face visits. However, our judgement is that the review was not disadvantaged by this: the sector review team found that stakeholders were willing to engage online, and in some cases found that it was more convenient to do so.
55. Our engagement with learners and other stakeholders, and the responses to our online questionnaire, provide us with useful insight into the opinions and perceptions of those involved. Whilst we aim, in this report, to accurately present the opinions expressed at the time, we are unable to validate or evaluate the accuracy of those opinions in all instances. Although we have sought to understand the views through discussion with sector experts and considered the findings in relation to the technical review, it is possible that some of the opinions expressed may reflect inaccuracies or partial understanding of the facts on the part of the participants.



## The findings

In chapters 4 to 8, we provide information on the findings of the review relating to:

**Chapter 4:** The overall qualification offer

**Chapter 5:** The content and currency of qualifications

**Chapter 6:** Assessment

**Chapter 7:** The wider qualifications system

**Chapter 8:** International review

## Chapter 4: The overall qualification offer

In this chapter, we report on those findings which relate to the qualification offer in the sector, including:

- the range of qualifications
- the availability of Welsh-medium qualifications
- progression routes
- apprenticeships and employer requirements

### The range of qualifications

- 56.** The qualifications that we reviewed were those offered by awarding bodies at levels 1 to 3 for learners aged 14 to 19 in Wales. These were taken by learners in a range of settings, such as secondary schools, further education colleges and work-based learning providers.
- 57.** When discussing the range of qualifications with stakeholders, it became clear that, unlike in some of the other sectors that we have reviewed, qualifications in this sector, particularly within travel and tourism, did not serve as a 'licence to practise' and were not a requirement for employment. In many cases, stakeholders highlighted personality and attitude as the key considerations during recruitment rather than qualifications. Several larger hospitality and catering employers, such as the Celtic Manor and Bluestone, also have their own training and induction programmes which are delivered by 'academies' and specifically tailored to the company.<sup>21</sup> These employers, therefore, placed less emphasis on qualifications during the recruitment process.

***"We would recruit on attitude rather than skill and then train accordingly."***

***Employer***

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<sup>21</sup> Three examples of academies across Wales:

Bluestone: [Academy | Careers | Bluestone \(bluestonewales.com\)](#)

Celtic Manor: [The Celtic Manor – Cambrian Training](#)

Dylan's: [Dylan's Restaurant \(dylansrestaurant.co.uk\)](#)

***“The company's in-house training is probably more challenging than some of the external companies that come in that offer the awards.”***

***Employer***

58. Overall, when discussing travel and tourism qualifications, stakeholders felt that the range of qualifications available was suitable, though several also highlighted a need for more smaller, short course qualifications tailored to specific industry roles, such as holiday reps, tour guides and travel agents. Some also felt that the range of qualifications has been reduced over the past several years, which has impacted on the choices available.

***“I would like to see a bit more variety. We used to have so much more variety and that's really been condensed down over the years.”***

***Lecturer in a further education college***

59. A few travel and tourism employers told us that they were not familiar with the qualifications being offered in secondary schools and further education colleges and that they would benefit from more information about the qualifications offered in these settings.

***“I wouldn't be able to say to you that I know exactly what qualifications the colleges are offering ... there is a plethora of them.”***

***Employer***

60. We were also told by some hospitality and catering employers that there was a lack of qualifications available for some front-of-house roles such as reception and housekeeping. They also told us that a qualification with optional front-of-house routes that would enable learners to transfer between roles would be useful.

***“In hospitality as a whole, I think there's a gap for front office, or maybe housekeeping [qualifications]. I know in years gone by there have been qualifications for that.”***

***Employer***

61. The importance of developing high-quality customer service skills and embedding these skills within qualifications in this sector was expressed by many employers and representatives from learning providers. Several employers suggested that a generic customer service qualification which develops transferrable skills would be beneficial and would support learners across a range of roles across the sector. Employers suggested that the skills that they most valued, and which were most underdeveloped in learners joining them from further education, were transferable customer service skills. They felt that these generic skills should be an important part of any learning programme within the sector and that current learning programmes and qualifications did not focus sufficiently upon this.



***“They might have the qualification, but they’re lacking the softer skills and the transferrable skills. And that should be much more built into the qualifications.”***

***Lecturer in further education college***

***“What I think would be really good is to have something that introduces learners to the world of hospitality. A qualification that's an introduction into it.”***

***Lecturer in further education college***



### **The availability of Welsh-medium qualifications**

- 62.** After reviewing the qualifications available on our QiW database and during the technical review, it became clear that there are limited options for learners undertaking qualifications in this sector through the medium of Welsh. This reflected concerns that were raised by representatives from Welsh-medium secondary schools offering post-16 vocational qualifications in schools. They gave an example of a suite of Pearson BTEC qualifications that was no longer available to Welsh-medium learners following the introduction, by the awarding body, of an externally examined unit to meet policy requirements in England. These schools were concerned that this limited choices for their learners, who would no longer be able to study the subject in the language of their choice.

***“The suite that was available in England used to always be available to us because there were no exams. Soon as they brought in those exams, they weren’t translating, so they weren’t available to us.”***

***Travel and tourism teacher in a secondary school***

- 63.** Furthermore, representatives from Welsh-medium schools with sixth forms also reported that there was a lack of Welsh-medium resources available for qualifications in this sector, and that there was often a delay when these were released in comparison to English-medium resources. It was felt that this could discourage learners from undertaking qualifications through the medium of Welsh.

***“But, as usual in Welsh, we have to translate everything and then two years later the book is published in Welsh. It’s not good enough really.”***

***Travel and tourism teacher in a secondary school***

64. We were also told that there is a lack of quality CPD training available through the medium of Welsh for secondary school teachers, and that resources at Welsh-medium CPD events are often either in English or are not of a comparable standard to the English medium resources. This can result in additional workload for teachers, who then have to translate the resources themselves.

***“I’ve been on courses where it’s meant to be a Welsh-medium course and they speak Welsh medium, and everything is in Welsh medium, but then the resources they give you are all in English. If it is done, I’ll be honest, it’s very poorly done.”***

***Travel and tourism teacher in a secondary school***

65. Several representatives from further education colleges reported that, while they had attempted to encourage learners to take qualifications through the medium of Welsh and provided good support to learners to do so in terms of both teaching and learning resources, there had been limited take-up of these opportunities by learners.

***“We find that learners who have gone through secondary education through the medium of Welsh and when they come to college, they don’t want to do it anymore. They’re reluctant to have it delivered in Welsh. The option is there. So we encourage it as much as we can, but at the moment we don’t have any delivery through the medium of Welsh.”***

***Lecturer in further education college***

### **Progression routes**

66. Through our discussions with learning provider representatives, it became clear that, in post-16 education, learners often take qualifications in travel and tourism for different purposes than those taking qualifications in hospitality and catering. Learners taking travel and tourism qualifications at level 3 tend to progress to higher education whereas learners taking level 2 or level 3 hospitality and catering qualifications tend to use them as a stepping-stone into employment or an apprenticeship.
67. Of the universities that we spoke to, all were delivering degree courses relating to travel and tourism, rather than hospitality and catering. They told us that learners entering these courses come from both general and vocational qualification routes, which are both useful in preparing for higher education, though the skills may be different.

***“They [learners with level 3 travel and tourism qualifications] are more prepared than I think some of the A-level students might be, but the skillset would be quite different. So the A-level students might have more of an experience of some of the writing maybe, while the vocational students have more of an understanding of the issues***

***and the challenges that we're talking about, and they might essentially grasp the concept a bit quicker."***

***Higher education programme director***

68. Some employers within travel and tourism reported that the current qualifications do include the technical skills needed to progress into the industry, however they do not fully support learners to develop 'soft' skills. Confidence, customer service and initiative were often mentioned as the 'soft' skills that are lacking in learners leaving full-time education.

***"I think the feeling from our board of directors has been that the courses that are delivered locally don't match the skills that they need."***

***Sector body***

69. Employers shared with us a range of different views about whether hospitality and catering qualifications prepare learners well for employment. Many echoed the views of learning providers that learners entering the workplace had had limited opportunities to practice their 'soft' skills, but they went on to say that neither did the current qualifications equip learners with the modern technical cookery skills that are required within the industry.

***"Sometimes students who come out of college will not have the skills to survive in an actual kitchen ... and they don't realise how long or how tough it really is to work in a kitchen, or they just don't have the relevant skills for it."***

***Employer***

***"In catering, when somebody comes fresh out of college from a chef background or from a front-of-house [background], and they haven't had a proper job before, you spend the first six months un-teaching them what they have just learned because they are learning it in a classroom setup whereas the real world is slightly different."***

***Employer***

70. Several employers across both travel and tourism and hospitality and catering acknowledged that their recruitment process is often based around an individual's 'soft skills', rather than their technical qualifications. Customer service skills, a positive attitude, teamwork skills, confidence and initiative were often highlighted as key skills that employers look for when recruiting, particularly as many larger organisations have their own bespoke training and development programmes.

***"It's not so much the experience and the qualifications; it's the person as well. So, somebody can have great experience, great qualifications, but if they're not going to fit into our team and not going to do things the way we do things, then we're not going to hire them, basically. They've got to be a good fit for us as well."***

***Employer***

## Apprenticeships

71. We also found, through our stakeholder engagement, differences between the two elements of the sector in relation to apprenticeships.
72. Firstly, we found that travel services apprenticeship frameworks mostly feature business administration or customer service qualifications rather than competence-based sector-specific qualifications. We also found that there are very few opportunities for learners to undertake an apprenticeship in travel services.
73. In contrast, there were many hospitality and catering apprenticeship pathways and opportunities, and employers often spoke highly of the value of apprenticeships within the sector. We found 24 apprenticeship pathways across levels 2 and 3, and the number of apprentices at these levels increased year on year between 2018 and 2020.<sup>22</sup> However, work-based learning providers suggested that the range of apprenticeship qualifications could be streamlined.

***“If you have a look at the frameworks that are out there, there’s a lot of pathways which are very specific. Rather than having so many pathways which are very specific and niche, bringing them all together almost and seeing what general skills people in the hospitality industry need.”***

***Work-based learning provider***



<sup>22</sup> This data is from the Welsh Government’s Lifelong Learning Wales Record dataset (LLWR).

## Chapter 5: The content and currency of qualifications

In this chapter, we outline concerns about the content and currency of qualifications in the sector relating to:

- travel and tourism qualifications
- hospitality and catering qualifications
- preferences for practical content

### Travel and tourism qualifications

74. During our stakeholder engagement interviews, most stakeholders agreed that, while current travel and tourism qualifications are broadly fit for purpose, they do need to be updated and refreshed to meet the current industry needs. The lack of Welsh context was also mentioned, with concerns that learners were progressing to employment with only a limited awareness of the industry in Wales. We were also told that it is important that qualifications should reflect the varied, highly skilled jobs which are available.

*“I do think that City & Guilds, although it is a good grounding ... it gives them plenty of knowledge going straight into the industry, I do think it’s a little bit out-dated in the sort of criteria and wording that they use.”*

*Travel and tourism lecturer in further education college*

75. This view was echoed during the learner focus groups, where we were told about how qualifications can introduce learners to a range of roles within the industry, which they may not previously have known about.

*“Before starting here, beyond being a travel agent or flying, I didn’t know about all these different roles within the industry. After taking this course, there are so many different roles and avenues that I can do.”*

*Travel and tourism learner in further education college*

76. Within travel and tourism qualifications, sustainability, digital technology and experiential tourism – were highlighted as topics that stakeholders felt should be included across all qualifications to reflect the modern industry.

*“Courses are outdated – the industry is changing and FE courses should be looking at the changes and adjusting the courses accordingly.”*

*Employer response to our online survey*

77. Learners overall valued the range of knowledge covered by the qualifications, however, some learners talked about the qualifications focusing too heavily on business skills, rather than other topics that they had expected. There were mixed views around this, with some learners enjoying this aspect and others less so.

*“We learned a lot, but it was more business, because it was a lot about money.”*

*Travel and tourism learner in a secondary school*

78. In some cases, we found that learning providers delivering travel and tourism qualifications were offering qualifications from more than one awarding body. This was to meet the needs of different profile learners, with several learning providers offering Pearson BTECs as an academic route and City & Guilds or NCFE qualifications as a vocational route.

*“We offer two different qualifications in terms of City & Guilds and BTEC for different profile students, and the City & Guilds is more vocational, the BTEC is more academic. And our BTEC learners are more likely to progress on to higher education, university, than our City & Guilds learners.”*

*Travel and tourism lecturer in further education college*



## Hospitality and catering

79. During our technical review, we found that there are more qualifications available within hospitality and catering than within travel and tourism, and there are many different pathways that learners can take. However, as the majority of hospitality and catering qualifications are being offered by only one awarding body (City &

Guilds), they were generally recognised and understood by learners and employers. We also heard of some examples of job advertisements referencing specific qualification numbers or titles.

80. However, many hospitality and catering stakeholders indicated that the current qualifications do not include current and relevant content and are, therefore, not meeting current industry needs. In our interviews with learning providers and employers, a majority suggested that the current qualifications needed to be reviewed to better reflect the needs of industry in the design and delivery of qualifications and to make the

current qualifications more relevant to Wales. This was supported by the responses to our online questionnaire, with only 37% of learning providers (18 out of 48) agreeing that the qualifications are up-to-date and relevant and only 27% of employers (6 out of 22) agreeing that the qualifications meet the needs of the modern industry. During our technical review, we found that many hospitality and catering qualifications are almost ten years old and do not reflect the significant changes brought about by developments such as digital technology and the impact of the COVID-19 pandemic.

***“My overview would be that largely speaking the catering courses aren’t fit for purpose. They don’t fit the modern industry. They’re too prescriptive, they don’t have enough emphasis on produce, provenance etc and they have too much emphasis on technical skills that are no longer that relevant.”***

***Employer***

***“I think we need to broaden the front-of-house qualifications to take into account the number of outlets and the way things have changed, especially in the last year. Front-of-house [staff] now need to be on their ordering screens and everything’s electronic – ordered from the table, printed out in a kitchen, served. It’s almost like a high level fast food type service, a fusion of services.”***

***Hospitality and catering lecturer in further education college***

81. Similarly, we were told that hospitality and catering qualifications should include more current restaurant trends and methods of cooking as well as the more traditional fine dining and silver service. Sustainability, food origin and supply chains, and the safety of the customer concerning dietary needs/allergies, were other aspects of content that stakeholders also felt was missing. Craft Cuisine and Professional Cuisine was also highlighted as a gap area within the current qualifications by work-based learning providers. These qualifications have been withdrawn by awarding bodies that were previously offering them, and there are no similar alternatives available.

***“A lot that they learn in college, on the cooking side and the front-of-house side, it is very classical and I don’t feel it has moved with the times at all. What they are taught is totally irrelevant to anything that they’re going to do here, and probably anything they’re ever going to do anywhere, unless they go and work in a classic kitchen, but there aren’t any classic kitchens anymore.”***

***Employer***

82. We were also told that that some of the hospitality and catering apprenticeship qualifications are outdated and do not reflect current industry trends and needs, and that there is a need to include modern culinary methods and techniques.

***“Teaching things like how to barbeque, how to cook on fire, how to smoke things and how to make pizzas, rather than how to make salmon mousse and bellini. I think they***

***need to move into making it more aimed at what we have in front of us at the moment, with street food, festivals, markets and restaurants.”***

***Work-based learning provider***

83. It was also suggested by employers and representatives from further education colleges that hospitality and catering learners would benefit from opportunities to develop ‘softer’ skills, such as confidence, initiative and dealing with customers, with employers indicating that these skills are lacking in young people.

***“They have to try and find that confidence within themselves. Likewise, dealing or speaking with a member of the public.”***

***Employer***

84. Some employers and representatives from within further education also told us that there should be more integration between front-of-house and back-of-house qualifications. For example, many learners within further education colleges are taking both kitchen and food service qualifications separately, as this gives the opportunity for a wider range of skills to be developed as well as allowing college restaurants to offer a full service. This allows learners exposure to the variety of roles before they specialise when they enter the industry.

***“I do think that all qualifications, especially professional cookery and food service, front of house and back of house should be interlinked. They should be one qualification. We need to be offering more customer service in them as well, because customer service is dying.”***

***Hospitality and catering lecturer in further education college***





85. Some representatives from work-based learning providers also highlighted that there is a perception amongst employers about the assessment of apprentices within hospitality and catering, with it often being viewed as a 'box ticking exercise', which then devalues the qualification. We were also told that the current assessment methodology is overly burdensome.

***"It's also the perception as well of an NVQ: sometimes they see the apprenticeships as a tick box exercise, they don't necessarily learn anything. We have tried to get away from that, as the apprenticeship is a worthwhile qualification, it's recognised and you've got to work hard to get it, and if a revision of the qualification means it's consistent throughout then it's good for us."***

***Work-based learning provider***

86. Several employers also suggested that the requirements of, and processes for, recruiting apprentices in Wales, presented a barrier to them taking on apprentices. They felt that it was complicated to access funding, that the required length of apprenticeships was prohibitive and that the range of experiences that learners needed to cover was too restrictive.

***"I think that they make it too complicated to get onto an apprenticeship in Wales, from a funding perspective, the restrictions of how long they need to be in jobs for, their experience and that sort of thing. I think it's become too complicated, and I think it puts people off."***

***Employer***

### **Preference for practical content**

87. During our learner focus groups, many learners talked about how they prefer practical learning rather than written theory work and how they often learn better through hands-on, practical tasks.

***"I don't learn as well doing theory. I learn hands on."***

***Hospitality and catering learner in further education college***

88. Many hospitality and catering learners also told us that the practical cookery aspects were the part of the qualification that they most enjoyed. Learners in further education colleges also talked about how they enjoyed working in their college restaurant, which gave them an opportunity to experience working in a real-life work environment.

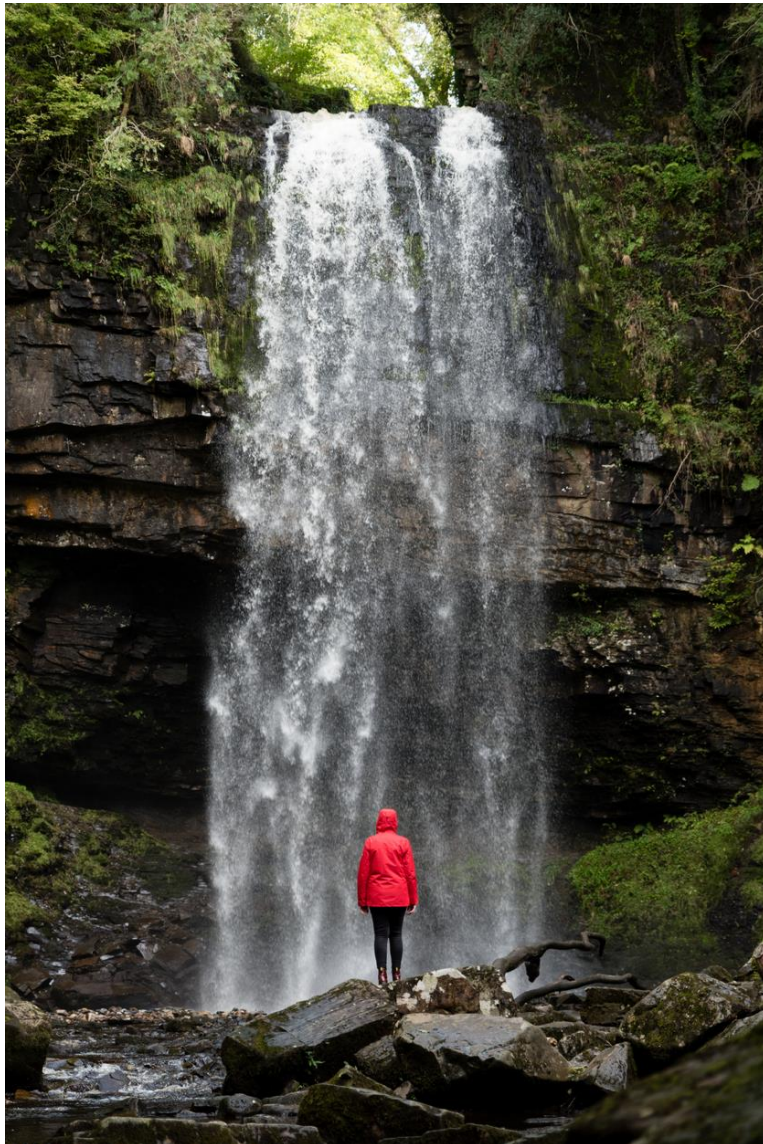
***"I think they should advertise more about how much service work we do. It's been hard but really good. I think if they advertised this more, then they would have more people sign up."***

***Hospitality and catering learner in further education college***

89. Learners studying travel and tourism also talked about how they enjoy the more practical tasks, such as role play. Some learners were expecting there to be more opportunities for practical learning as part of their qualification and felt that this would be more helpful in developing the skills needed for employment.

*“I was expecting it to be more scenario based, or role play, and less writing. Role play is easier than writing and gives you a more realistic experience for your job in later life than writing does, like role playing customer service on an aeroplane.”*

**Travel and tourism learner in further education college**



## Chapter 6: Assessment

In this chapter, we outline concerns about the assessment of qualifications, including:

- burden of assessment
- reliance on written assessment
- inconsistencies in assessment standards and requirements
- examinations
- external quality assurance

### Over assessment and manageability

90. Overall, stakeholders had a range of different views about the assessment of travel and tourism qualifications. While some further education college subject leads told us that they felt assessment was generally fit for purpose, others had concerns around the number of assessments that learners need to complete. This was supported by the findings of the technical review, where we found that, in some cases, learners were required to complete a seemingly unmanageable number of written, theory-based assignments.
91. We also heard from a number of learning providers delivering hospitality and catering qualifications that there is simply too much assessment, which puts pressure on learners and reduces the amount of time available for teaching, and to practice and refine skills.

*“Whether it be BTEC or whether it be NCFE, the way that you break it up tends to be three assignments for every module and, if they’re doing nine modules in an academic year, you’re talking about 27 assignments in a 35- week term, plus they’re doing Welsh Bacc. The issue for me is are they deep learning? I think I would suggest it’s more surface learning.”*

**Travel and tourism lecturer in further education college**

92. We also received similar feedback through our online learner survey, where learners told us that there were too many assessments and that they are often assessing the same skills. Learners also suggested that preparing for these assessments takes up a significant amount of teaching and learning time.

*“There are too many exams that test the same skills unnecessarily.”*

**Learner response to online survey**

### Over-reliance on written assessment

93. In both travel and tourism qualifications, and hospitality and catering qualifications, we found there was generally an over-reliance on written assessments. In some cases, learners were expected to produce written assignments on an almost weekly basis and portfolios were made up of mostly written tasks. Many learning providers told us that the

practical nature of travel, tourism, hospitality and catering should be reflected in the assessments.

94. This view was supported during our learner focus groups, where learners commented on the number of written assessments that they were being expected to complete. Some learners told us that they did not enjoy the written assessments and would have preferred more practical assessment methods and demonstrations. A few learners also told us that they did not see the relevance or benefit of some of the theory work that they were asked to complete.

***“We get given information and all you have to do is remember them for the test. I don’t feel as if I’m learning – I’m just learning information for an exam.”***

#### **Hospitality and catering learner in a secondary school**

95. During the technical review, we reviewed samples of learner work provided by awarding bodies and we found that many of these comprised very large portfolios of written work, including evidence for the completion of practical tasks. Members of the review team questioned the relevance of some of the written tasks and whether these were the most suitable method of assessment, as well as highlighting their potential to disengage learners.
96. We saw some use of digital technology in the assessment of qualifications in the review, including on-screen multiple-choice tests. Centres did not report any issues relating to the use of on-screen tests, so there would not appear to be barriers to an increased use of such tests and other uses of digital technology in the future or multiple-choice tests.

#### **Inconsistent assessment requirements and standards**

97. Through both our technical review and through feedback from representatives from further education colleges, we also found evidence of inconsistent levels of demand between assessments for different travel and tourism qualifications, with some qualifications being viewed as more demanding than others.

***“We did offer Level 2 BTEC [Travel and Tourism] a few years back, but they had changed the qualification for level 2 and it was really very demanding. So we decided at level 2 that we would only offer City & Guilds, which seemed to be much more relevant to the industry and more easily obtainable.”***

#### **Travel and tourism lecturer in further education college**

98. During our technical review we found some examples of assessments and learner work from both the Level 3 City & Guilds Travel and Tourism qualifications and Level 3 NCFE Travel and Tourism qualifications that were simplistic and did not provide appropriate stretch and challenge for level 3 learners. For example, a number of tasks were based on recalling information rather than applying learning to a relevant context.

99. Some representatives from further education colleges also told us that the assessments for some travel and tourism qualifications, particularly at level 3, were overly prescriptive. They also felt that this level of prescription didn't prepare learners for higher education, where they would be required to carry out their own investigations.

***"I think the problems we see [are] with our students who progress to degrees. It's because it [the level 3 qualification] is so prescriptive: they must do x, y and z to be able to pass that particular module. Once they go to university, and the research is up to them and they can choose what they're going to write about within that module, they find that difficult because they've been told what to research before."***

***Travel and tourism lecturer in further education college***

100. In hospitality and catering, some representatives from further education colleges also told us that they had concerns around inconsistencies between assessors and the risks around varying standards being applied.

***"I think they rely heavily on what the assessor is seeing, but then I think sometimes maybe the assessor can manipulate what they see ... so it comes under the assessor's impressions or the assessor's judgement. Depending on what type of assessor you get will be dependent on the quality of the assessment."***

***Hospitality and catering lecturer in further education college***

## **Examinations**

101. When discussing travel and tourism qualifications with a number of further education college subject leads, we were told by some that they had decided to move from one awarding body to another based on the challenging nature of the assessments and the introduction of external examinations. This was because, in the respondents' view, vocational learners prefer other forms of assessment. Therefore, they had moved to similar qualifications being offered by other awarding bodies which were fully internally assessed. Whilst there were also some external exams within the hospitality and catering post-16 qualifications, generally fewer concerns were raised around these.
102. We received feedback from representatives from secondary schools about the Level 1/2 Hospitality and Catering qualification being offered by WJEC. These teachers told us that learners who fail the examination are then unable to pass the qualification, even if they scored highly during their practical assessment. We were told that learners found this demotivating and unfair. However, we have since been assured by WJEC that this requirement has now changed as part of the revised Level 1/2 Hospitality and Catering qualification which was available for first teaching in September 2022.

## External quality assurance

103. Overall, we received little feedback on external quality assurance from learning providers. Of the feedback we did receive, some learning provider representatives felt that the processes the awarding bodies use were overly burdensome.

***“Travel and tourism – I cannot believe the sample that we had to send away recently. If we’ve demonstrated that we can quality assure three whole portfolios then surely they are checking our processes; we shouldn’t have to send them 12.”***

***Travel and tourism lecturer in further education college***

104. However, other learning provider representatives that we spoke to reported positive experiences with the external quality assurance processes.

***“My experiences have been good. I haven’t had any issues. In the 20 years that I’ve been here, working at HE and at FE and as the lead IV [internal verifier] at FE, the externals that I’ve dealt with have been absolutely superb.”***

***Travel and tourism lecturer in further education college***

105. There were a small number of representatives from further education colleges who told us that the guidance given by external quality assurers could sometimes be unclear and could contradict industry requirements. Some also felt that they would benefit from more regular check-ins with their external quality assurer.

***“Even after talking to them sometimes, they’re not clear in their instructions. You only ever see them once a year. I think it would be good if they came in just as an interim, halfway through the year, just had a quick look at things, see what was going on, see if anybody’s got any problems.”***

***Hospitality and catering lecturer in further education college***



## Chapter 7: The wider qualifications system

**In this chapter, we outline the findings of the review relating to:**

- how the COVID-19 pandemic affected the delivery of qualifications
- links between employers and learning providers
- awareness and perception of the industry
- availability of technical equipment and resources
- recruiting and retaining specialist teachers
- continuing professional development (CPD)
- academies

### How the COVID-19 pandemic affected the delivery of qualifications

- 106.** Throughout the review, the impact that the COVID-19 pandemic had on the sector was clear. As has been widely reported in the media, this was an extremely challenging time for the industry. During the pandemic, employees within the food services and accommodation sector accounted for 18.6% of all furloughed workers in Wales<sup>23</sup>. As we have moved out of the pandemic, the sector has not only experienced a recruitment crisis, but is having to continually adapt to changing customer needs and expectations.
- 107.** Using digital apps, new contactless payment methods and social media to promote businesses are among the topics that we were told will be important within the industry post-pandemic.
- 108.** However, some employers also highlighted that while the number of workers leaving the sector has been widely reported, there are also those who are seeking roles within the sector as a career change. We were told that providing opportunities for these workers to achieve qualifications will be important in helping to attract and retain these new employees.

***“Since COVID, people have been contemplating their life and what they want to do with their careers. So although we have had people leave the industry, like chefs, we have had a couple actually join the team who have left another industry to try and come into this one.”***

***Employer***

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<sup>23</sup> <https://phw.nhs.wales/publications/publications1/covid-19-and-employment-changes-in-wales-what-we-know-about-current-and-future-impacts/>

## Links between employers and learning providers

109. Throughout the review, we received comments on a number of issues which are outside the scope of the review and the direct work of Qualifications Wales. However, we have a responsibility to pay regard to the effectiveness of the qualifications system as a whole, so, as these matters were raised, we feel it would be helpful to reflect on them.
110. The COVID-19 pandemic had a significant impact on opportunities for work experience across both travel and tourism and hospitality and catering. Some learning providers have tried to mitigate this by providing alternatives, such as virtual talks from employers.
111. Many employers, learning providers and learners told us about the importance of work experience and how much they valued opportunities to learn in a hands-on, real-life environment.

***“I love doing the restaurant service, coming out to speak to the customers and everything – that’s really good. We come out and they send a couple of chefs out to talk to everyone. It’s good. If something is wrong, they can tell us, and we know then what to work on.”***

### ***Hospitality and catering learner in further education college***

112. There were, however, different views on how best this could be achieved within hospitality and catering courses being studied at further education colleges. Some stakeholders felt that learners would benefit more from carrying out work experience directly with employers, while others felt that the realistic working environments provided through the college restaurants allows learners to gain a broader range of skills and more opportunities for feedback. As many further education colleges deliver both front-of-house and back-of-house qualifications, learners are able to gain experience across the full range of service.

***“I think having the work experience within the college environment gives a massive safety net to the learners. And there are two sides to it: it fits the students, because you can get the training there, and when the customers come to the restaurant, they’re expecting to be served by students. So they appreciate if mistakes are made. When they get into the professional industry, all that goes out the window – there’s no safety net.”***

### ***Hospitality and catering lecturer in further education college***

113. Employers told us that they valued the experiences that learners gained in simulated settings but suggested that they could play a greater role with providing more work placements as an informal part of learners’ programmes (though not necessarily assessed through the qualification). A number of employers also talked about the seasonal nature of the sector within Wales, and how this can impact opportunities for work experience. Some suggested flexible timetables within further education colleges to allow learners to access a greater range of employment or work experience opportunities.



***“For tourism and hospitality, they need to twist the end of the academic year for students, say to February half term. There could maybe be some assessments. But if you’re coming out with young chefs, young hospitality students, newly trained people in February, there would be jobs galore. You release students in June and July, those jobs have gone and, by next tourism season, they’ve dispersed into other sectors.”***

***Employer***

- 114.** Learners and learning providers either taking or delivering travel and tourism qualifications also told us about the value of real-life, hands-on experiences. Within travel and tourism courses, this was usually achieved through trips and visits to tourist attractions, or through employers visiting the classroom to talk about their work. This was an aspect of their courses that many learners enjoyed and gave them an opportunity to learn about the different roles within the industry.

***“Going out and seeing it for ourselves rather than typing up about it. You learn more seeing things. On the visits we went to different accommodation types. Serviced and non-serviced, caravans and log cabins.”***

***Travel and tourism learner in further education college***

- 115.** Through our technical review, we found that some of the existing travel and tourism qualifications did include optional work experience units. However, few learning providers appeared to be delivering these, often due to difficulty in engaging with employers and supporting learners to access suitable placements. Some learning providers told us that they would like to address this by developing stronger links with employers but noted that the overly burdensome paperwork required was a barrier.

***“We don’t do the unit, because the challenges of putting it together, the time allowed to do it, the paperwork and bureaucracy involved in it, and, when we’ve tried to do it in the past, the travel and tourism industry doesn’t seem to want to engage that much with us.”***

***Travel and tourism lecturer in further education college***

### **Awareness and perception of the industry**

- 116.** Throughout the review, we were told by stakeholders that more could be done, particularly by schools and careers advisors, to raise awareness of the sector and promote the opportunities that are available. Many employers expressed strong views around the negative and outdated perceptions of the industry, such as it being low skilled and involving long hours and low pay. Employers told us that schools and careers advisors could help to address these perceptions by promoting the industry as a valuable career choice.

***“One of the frustrations we have had is that we sometimes think that schools are not suggesting hospitality and tourism to their pupils as a good career option. And I do***

*think sometimes people don't understand the value of a career in hospitality. What I would say to a young person who was wondering what to do is that there are great opportunities for advancement within hospitality if you have the skills and the commitment and the work ethic. And as a job it might be incredibly stressful, but it's also incredibly varied and incredibly satisfying when it goes well."*

**Employer**



117. Many employers also talked about the perception that working within the sector is more of a temporary, seasonal job and not a long-term career pathway with opportunities to be flexible. Some employers acknowledged that there is a role for the industry to address this, particularly following the COVID-19 pandemic, and this can be seen through new initiatives such as Visit Wales' 'Experience Makers' campaign.<sup>24</sup>

*"This is something that we've got to change, how people view hospitality. Which we have done, we've done it loads over the years, but we now need to redo that now to get everybody back into hospitality that has left."*

**Employer**

118. Employers and representatives from further education colleges and work-based learning providers also expressed the view that apprenticeships within the sector should be promoted more effectively by secondary schools. Several stakeholders felt that secondary schools focus on promoting higher education and could do more to promote apprenticeships as an alternative pathway for learners.

*"There seems to be, or there used to be, a strong drive to get people into further or higher education. Maybe they're not actually best suited to that and people were*

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<sup>24</sup> <https://workingwales.gov.wales/change-your-story/work-in-hospitality-and-tourism>

***falling into things, maybe without the commitment or drive that they actually want it as a career, but it was just something to do.”***

***Employer***

- 119.** However, when we spoke to learners currently taking qualifications, few expressed concerns around the amount of information they had received prior to beginning their course.
- 120.** During these focus groups, learners shared a variety of different reasons as to why they chose to study their qualification. Whereas some were influenced by friends or family who worked within the sector, others felt that the qualifications could help them to develop 'life skills'. Those studying travel and tourism qualifications were also attracted by options to travel and work abroad in future.

***“I applied because the last thing I want is an office-based job. Other than travel agents, most jobs aren't office based. Even for travel agents you get plenty of opportunities to travel. There are loads of interesting jobs out there.”***

***Travel and tourism learner in further education college***

#### **Availability of technical equipment and resources**

- 121.** When discussing their equipment and facilities for hospitality and catering qualifications, most representatives from further education college told us that they generally have the appropriate resources needed to deliver the qualifications effectively. Most colleges also have their own restaurants which are being run by learners and, as these restaurants are open to the public, this provides learners with the opportunity to experience real-life service. While many told us that they had a 'wish list' of additional equipment, they acknowledged that they are generally well equipped and have access to quality, modern facilities.

***“I think the standard of equipment that is available now in most colleges is what is needed to get people ready for industry. So I think the level is right, that colleges aren't spending ridiculous money on equipment and we've got the right basic equipment there to deliver the qualifications.”***

***Hospitality and catering lecturer in further education college***

- 122.** However, through our stakeholder engagement it became clear that secondary schools do not have access to the same standard of equipment as further education colleges when delivering hospitality and catering qualifications. Secondary school teachers often told us that they do not always have access to modern equipment and have a small number of ovens. This impacts on the recipes that learners are able to make and also on assessment timetables due to the amount of equipment available at any one time.

***“Cooker space is my biggest issue ... we've just got standard domestic cookers so it's quite difficult really to cook anything major. So when they do their assessments, I***

*literally have one student per cooker. So we have to run it over a couple of days and pull students out of classes."*

*Hospitality and catering teacher in a secondary school*

123. Representatives from further education colleges and secondary schools shared concerns around the cost of delivering hospitality and catering qualifications. Further education college lecturers told us that it can be difficult to deliver these qualifications effectively based on the current funding that they receive. Secondary school teachers expressed similar views and told us that the cost of buying ingredients is generally passed on to parents, which can impact on the foods and recipes that they are able to select and may impact on qualification take up. This also indicates that there is a lack of parity between learners studying in schools and further education colleges, as those who are in further education colleges are not expected to cover the cost of ingredients.

*"Equally, I don't think the awarding bodies consider the additional costs that are incurred. For example, level 3 larder is an extremely expensive course*

*Hospitality and catering lecturer in further education college*

*"I tried doing a smoked salmon dish in school and then I priced it up before I sent it home and it was coming to something like eight or nine pounds just for the one dish and I think that's not really fair to parents. Then if they make a mistake and they come home with nothing, that's another thing you've got to consider."*

*Hospitality and catering teacher in a secondary school*

124. Overall, travel and tourism representatives from both further education colleges and secondary schools raised fewer concerns around the availability of resources (other than those related to the availability of Welsh-medium resources, as explored in Chapter 3). Concerns that were shared were often related to availability of IT equipment and funding of trips and visits.

*"We have plenty of atlases and maps, and all the sorts of things that we need really to teach travel and tourism. So I would say that although extra resources would be nice, a travel agency would be nice, realistically, yes, I think our resources that we have currently are sufficient."*

*Travel and tourism lecturer in further education college*

125. Several secondary school teachers delivering travel and tourism qualifications also told us that they would like to see more teaching resources, such as textbooks and exemplar materials, being offered by awarding bodies. We were told that there is currently a lack of ready-made resources for travel and tourism qualifications across both level 1/2 and level 3.

***“It’s very poorly resourced [WJEC Level 3 Tourism]. There are some materials on the WJEC website but they just tend to be very brief notes ... practically, you have to make your own resources really.”***

***Travel and tourism teacher in a secondary school***

### **Recruiting and retaining specialist teachers**

- 126.** When asked about their challenges and concerns, a number of learning providers, particularly those in secondary schools, told us that recruiting and retaining specialist hospitality and catering teachers was a key issue.
- 127.** As a result of the lack of specialist hospitality and catering staff within secondary schools, we were told that qualifications are often being delivered by non-specialist staff, some of whom may have limited experience in the sector.

***“It’s great to see different people teaching it, but I do find that there’s a lot of science teachers pushed towards into food now, and possibly PE teachers who haven’t got enough on their timetables. So in terms of specialists, I can probably count on one hand how many I know teaching in my area.”***

***Hospitality and catering teacher in a secondary school***

- 128.** Some similar concerns were expressed by teachers delivering travel and tourism qualifications in secondary schools. We were told that it is often business studies or geography teachers delivering these qualifications, and while many could see the strong links and overlaps with travel and tourism, some expressed concerns that others may not view travel and tourism as a main priority subject.
- 129.** Representatives from further education colleges also told us that it can be difficult to recruit hospitality and catering staff with the appropriate skills and experience, as well as a teaching qualification.

***“Especially in professional cookery, trying to get someone who’s got the skills ... well, first of all, who’s got a level 3 qualification because a lot of chefs don’t actually have a qualification. They have just got vast amounts of experience, so finding someone who has actually got a qualification, and then who has got a PGCE, this is absolutely unheard of.”***

***Hospitality and catering lecturer in further education college***

## Continuing professional development (CPD)

- 130.** Overall, there were few issues raised around access to continuing professional development (CPD) for teachers of both travel and tourism and hospitality and catering. The concerns that were raised were mostly from secondary school teachers, some of whom felt that they would benefit from more opportunities to access CPD for both travel and tourism and hospitality and catering. There was a strong agreement between stakeholders around the importance of accessing quality CPD and training, particularly for non-specialist teachers who may be new to the subject.
- 131.** A number of the lecturers delivering hospitality and catering qualifications within further education colleges highlighted that they are able to spend short periods of time working in the industry and felt that this was very beneficial in maintaining up-to-date knowledge and experience of the sector. Those who had difficulty in accessing appropriate CPD opportunities mostly told us that this was due to timetable pressures rather than a lack of opportunities being available.

## Academies

- 132.** Several larger companies, such as Bluestone and Compass Group, have developed their own hospitality academies that offer work-based learning opportunities, work experience and outreach programmes. This is an aspect of the sector which is different from many of the other sectors that we have reviewed. Several employers and sector body groups that we spoke to throughout the review told us about the potential benefits of these academies, and how they see them having a positive impact on the sector in terms of raising standards and attracting new talent.

***“We’ve identified through our research [that] there is such a perception about working in our industry that people don’t want to do it. So, through the Academy, what we would like to be able to do is try and challenge that perception and change that perception by introducing courses that kids do want to do and that are fun and exciting and rewarding enough that their parents would be proud to encourage them to join.”***

***Employer***

## Chapter 8: International Review

**In this chapter, we summarise the findings of an international review that was conducted as part of the review.**

- 133.** As part of the review, the review team and sector advisors conducted an international review to explore how other countries structure, deliver and assess qualifications in the sector and to identify good practice that could be considered for Wales.
- 134.** The review was conducted between February and December 2021 and focused on five relevant countries. These countries were Australia, Canada, New Zealand, Republic of Ireland and Scotland. Information and evidence from a combination of nine in-depth interviews with key stakeholders from the five countries and a desk-based review of publicly available documents was collected for this report.
- 135.** The review highlighted a number of interesting findings. It identified that most of the countries reviewed are either looking to develop, or already have developed, opportunities for learners to prepare for the transition to work. This may be through specific content in the curriculum, providing work experience opportunities or starting an apprenticeship programme. The review identified that work-based learning / CPD is limited in many countries. This is mainly because of the number of SMEs that are in place and their inability to release staff for further training. Some countries, including Scotland, have developed, or are developing, a suite of micro-credentials that individuals could gain by completing short programmes of study. The review also identified that all countries have already introduced or are planning to introduce more emphasis on 'soft' skills through their Vocational Educational Training (VET) curriculum, including apprenticeships.
- 136.** The review also highlighted some challenges facing other countries that are similar to those being faced in Wales. These include challenges around the perception of hospitality being poor in most countries, because of low pay, unsociable hours and perceived lack of opportunities. Traditionally it was noted that parents and schools place more emphasis on progressing to higher education than vocational education and employment, and all countries acknowledged the difficulty of getting employers involved in qualification development and delivery. The review also highlighted the importance of qualifications including current content on the changes to the industry due to the COVID-19 pandemic, particularly in the catering sector, which is changing rapidly as different types of establishments are being developed, each requiring different skills and qualities from their staff.
- 137.** We are grateful for the contribution of the sector advisors and the key stakeholders involvement in the completion of the international review. The full report can be found [here](#).

## Chapter 9: Actions we will take

**In this chapter, we outline the actions that we will take to address the issues identified by the review.**

- 138.** This review has identified numerous strengths of the sector, including the opportunities available for practical learning, real-life experiences outside of the traditional classroom environment and exciting career prospects to aspire to. Nevertheless, there are issues that need addressing. These primarily relate to the currency of content and assessment of the qualifications currently offered in Wales and the limited availability of Welsh-medium qualifications.
- 139.** We have considered the options that are available to us to address the issues that we have identified, as far as reasonably possible. We have discussed and developed options with employers, learning providers, sector experts, awarding bodies and our Stakeholder Advisory Group members, through a combination of in-depth discussions and workshops. We have considered the strengths and weaknesses of the different options and have developed an action plan which outlines the steps that we will take.
- 140.** The actions we will take are set out below in four sections. In the following pages, we have outlined our considerations when deciding on each course of action.
- **Section 1 – Actions relating to travel, tourism, hospitality and catering qualifications for 14-16 year olds**
  - **Section 2 – Action relating to post-16 travel and tourism qualifications**
  - **Section 3 – Actions relating to post-16 hospitality and catering qualifications**
  - **Section 4 – General actions relating to travel, tourism, hospitality and catering**





## Section 1: Actions relating to travel, tourism, hospitality and catering qualifications for 14-16 year olds

141. The actions outlined below relate to our ongoing *Qualified for the Future* work to develop new qualifications, including GCSEs, for 14-16 learners that support the aims of the new Curriculum for Wales. In addition, we are reviewing the 'full offer' of qualifications to ensure that it is coherent and inclusive. More information about this programme of work can be found on our website.<sup>25</sup>

### **Action 1: Include relevant content in new GCSEs**

142. Through our *Qualified for the Future* project, Qualifications Wales is currently developing requirements for a range of new qualifications, including GCSEs, for learners aged 14 to 16. These qualifications are being designed to support the Curriculum for Wales. We are working closely with teachers and others to co-create the high-level purpose, content and assessment for each of these qualifications, based on the Curriculum for Wales guidance.<sup>26</sup>
143. The findings of the review have fed into the development of some of these GCSEs. In particular:
- the proposed new GCSE Food and Nutrition qualification will support learners to understand the journey of food and drink 'from field to fork', as well as to develop a range of practical cooking skills
  - the proposed new GCSE Geography and GCSE Business will provide opportunities to study areas of tourism such as sustainability and Welsh urban and rural tourism within the flexible content
144. The review identified that learners aged 14-16 would benefit from a broad foundation of knowledge and skills in travel, tourism, hospitality and catering. Qualifications delivered in secondary schools are a valid starting point for young people to learn about the industry and the variety of roles which they could aspire to. The new GCSEs in Food and Nutrition, Geography and Business will be available for first teaching in 2025.

### **Action 2: Proposals for entry level/level 1 and level 1/2 qualifications for 14-16-year-olds as part of our 'full offer' work**

145. As part of our *Qualified for the Future* work, we are reviewing the full offer qualifications that will be available, alongside new GCSEs, to meet the needs of learners aged 14 to 16 and to support the new Curriculum for Wales. We are looking at all qualifications from entry level to level 2 in a wide range of subjects, including travel, tourism, hospitality and catering. The full offer consultation includes proposals for entry level/level 1 and level 1/2 qualifications in travel and tourism and in hospitality and catering. We will ensure

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<sup>25</sup> [Qualifications Wales / Qualified for the future](#)

<sup>26</sup> See <https://hwb.gov.wales/curriculum-for-wales/>

that these developments, should they go ahead following consultation, address the findings of this review.

- 146.** The review identified that learners aged 14-16 need a broad foundation of knowledge and skills in travel, tourism, hospitality and catering. Qualifications delivered in schools are a suitable starting point for young people to learn about the industry and the variety of roles which they could aspire to. We heard how the emphasis on practical, hands-on training that is linked to a specific sector area is highly motivational for many learners. The importance of vocational qualifications in supporting inclusivity and equality was evident from our stakeholder feedback. Alternative assessment and delivery approaches, practical skills emphasis and content that relates to the world of work in various fields can offer more choice than GCSEs alone.

## **Section 2: Actions relating to post-16 travel and tourism qualifications**

- 147.** Based on the evidence found by the review team, the current 10 post-16 travel and tourism qualifications offered by awarding bodies in Wales generally meet the reasonable needs of learners in terms of the range available. However, we identified evidence to suggest that change to post-16 travel and tourism qualifications is needed to update the currency of content, to include references to the Welsh context and to include a greater focus on customer service skills. There is also a need to reduce the assessment burden. Therefore, we are proposing to develop high-level approval criteria for priority, unrestricted approved qualifications in travel and tourism for 16-19 year olds in Wales. This will enable us to ensure that the existing qualifications (listed below) are updated in line with the findings of the review.

- City & Guilds Level 1, Level 2 and Level 3 in Travel and Tourism
- NCFE Level 1, Level 2 and Level 3 Travel and Tourism
- Pearson Level 1, Level 1/2 and Level 3 BTEC in Travel and Tourism
- WJEC Level 3 in Tourism

### ***Action 3: Development of high-level approval criteria for travel and tourism qualifications***

- 148.** We will introduce a set of high-level approval criteria for the development of priority, unrestricted approved travel and tourism qualifications to replace the qualifications (listed above) that we identified are in need of updating. The new approval criteria would require awarding bodies to demonstrate:
- that the qualification content is up to date and relevant (including Welsh context and customer service units)
  - that the qualification content reflects the needs of industry and, where relevant, that the views of industry have been considered during the development and/or review of the qualification
  - that they have considered, and sought to overcome, the issues identified by the review in relation to assessment

- 149.** One of the primary findings of this review is that some qualifications in the sector do not include up-to-date and relevant content. We have been encouraged by the content of some of the newer qualifications that have been, or are in the process of being, introduced in Wales. However, given the scope of this review, there are several qualifications in the system where we have limited evidence to assure us that the content is up to date and relevant. Some of these qualifications were developed several years ago, and it is likely that they require an update to their content. We are committed to ensuring that learners in Wales access qualifications that include up-to-date and relevant content which should adequately prepare them to progress to further study or employment.
- 150.** Secondly, the review identified specific issues in relation to assessment. Stakeholders expressed concerns over the manageability of assessments and over-reliance on written assessment methods. This was strongly supported by our technical review, where we found that learners are expected to complete a very high number of written assessments, which could be unmanageable and disengaging. We also found evidence of inconsistent levels of challenge within assessments, particularly at level 3. We therefore recommend that opportunities for practical learning and assessment are explored.
- 151.** By publishing new high-level approval criteria, we can ensure that awarding bodies have taken meaningful steps to ensure that the content is up to date and relevant to industry and that the assessment is engaging and manageable.

### **Section 3: Actions relating to post-16 hospitality and catering qualifications**

- 152.** The actions in Section 3 cover post-16 qualifications in hospitality and catering and are based on the evidence found by the review team that the current post-16 hospitality and catering qualifications offered by awarding bodies in Wales are largely not meeting the needs of learners and the industry. Therefore, we have considered, over several months, the possible extent and nature of reform. We have discussed and developed options with employers, learning providers, sector advisors, awarding bodies, our Stakeholder Advisory Group members and Welsh Government through a combination of in-depth discussions and workshops. In each case, we have weighed up the benefits of relying on developments in England or of taking control of reform in Wales balanced with a recognition of the need for cross-border portability. We have considered aspects of manageability, validity and reliability as well as the importance of assessment being engaging for learners.

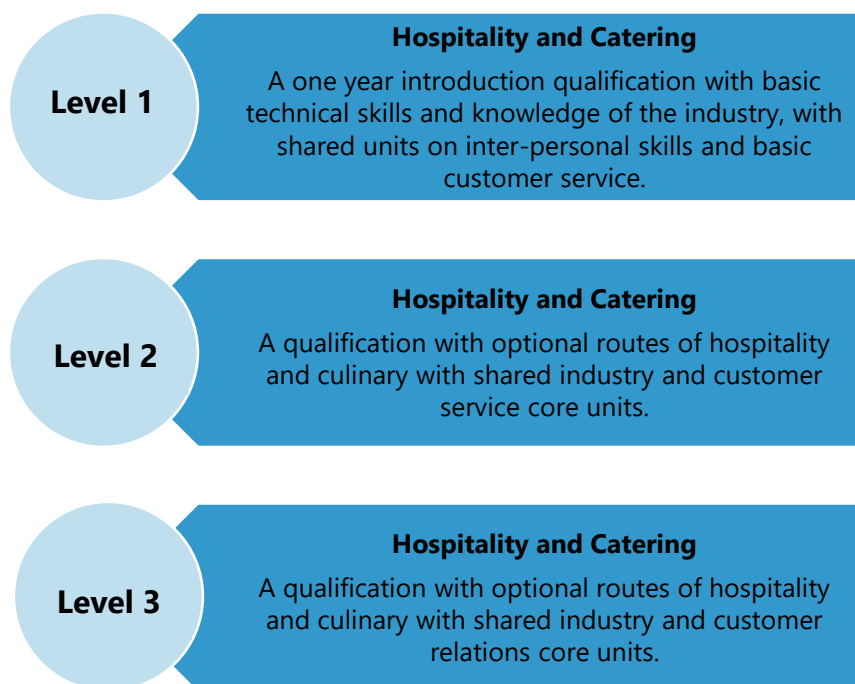
#### ***Action 4: Commissioning a new suite of qualifications for post-16 hospitality and catering***

- 153.** We are proposing, in the spring of 2023, to consult with stakeholders on whether we should commission a new suite of priority, restricted post-16 qualifications for hospitality and catering at levels 1 to 3, to be delivered in both further education colleges and work-based learning settings. If, having considered the feedback from the consultation, we felt that this would be an appropriate course of action, we would invite awarding bodies to bid for a concession contract to develop and deliver a new suite of bilingual Made-for-

Wales qualifications. Such a consultation is important to us because commissioning new qualifications from a single awarding body would represent a significant intervention to the qualifications market. We will launch this consultation in March 2023.

154. The qualifications that we would commission would replace existing qualifications in the sector with a clearer, simpler and more coherent suite of three qualifications. These would replace the wide range of existing qualifications with a simple three-tier structure encompassing appropriate pathways. We tested this outline model extensively with stakeholders through the spring and summer of 2022 and would look to develop it further prior to tendering for an awarding body to develop and deliver the qualifications. This model is set out below in Figure 1.

**Figure 1: Proposed model for new hospitality and catering qualifications**



155. The model represents a new suite of three hospitality and catering qualifications at levels 1, 2 and 3. It proposes that, at level 1, there would be an introductory qualification covering basic practical technical skills and knowledge of the hospitality and catering industry and including core units on inter-personal skills and basic customer service skills. This would address the review findings that learners leaving further education lacked the confidence and softer skills to enter the industry. At levels 2 and 3, the model proposes new hospitality and catering qualifications, developed to meet the needs of both further education colleges and work-based learning settings (apprenticeships) to allow for the range of pathways which a learner can take, with progression to either higher education or employment within the industry. All three hospitality and catering qualifications would have forms of assessment and new content informed by the findings of the review.

156. The review identified that all learners would benefit from a common core of learning which would better equip them for their future careers (which may be flexible and varied) and that learners would then benefit from specialising in either culinary skills or in hospitality skills. We have discussed this with stakeholders and there is broad support for condensing the existing range of qualifications into a smaller core and options offer. The core would include units on the nature of the industry and customer-focused skills, customised for each level of learner.
157. The new qualifications would each have optional routes of hospitality or culinary or a combination of both, with shared industry and customer service/relations units. This would ensure that the range of pathways in the current hospitality and catering qualifications is not lost. The optional units for hospitality and culinary would also be able to be delivered as stand-alone units for short courses or continued professional development. The units would be based on the relevant National Occupational Standards to ensure that they would be eligible for use on apprenticeship programmes funded by Welsh Government.
158. We considered whether it would be sufficient to simply develop and publish approval criteria for these qualifications and to invite any interested awarding body to develop the qualifications without putting a restriction in place. However, our discussions with awarding bodies have indicated that, were we to do so, it is unlikely that an awarding body would develop the qualifications without the security of a restriction to guarantee the whole market, given the relatively small size of the market in Wales and the cost of developing and delivering brand new qualifications. This is why, in our forthcoming consultation, we will be proposing to restrict and commission the qualifications through a competitive procurement process. Our options analysis is set out in Appendix 2 below.
159. Following the consultation, should we proceed with the commissioning process, we would, together with the successful awarding body, develop approval criteria through engagement with stakeholders in industry and education to refine our requirements for a fresh and relevant suite of qualifications that address the findings of the review in full, in particular:
- the complex and confusing qualification structure
  - outdated content and focus
  - omission of important up-to-date content such as the use of modern technology, dietary requirements and sustainability
  - lack of relevance to the Welsh context

***Action 5: To review the level 3 provision for level 3 learners in schools***

160. The review also considered pathways for level 3 learners in schools and, while we will not be taking immediate action in this area, we will consider whether there should be provision at level 3 in Food and Nutrition as part of our wider review of level 3 qualifications to follow the work of the *Qualified for the Future* project.

161. In hospitality and catering, the level 3 provision available in schools is currently WJEC Level 3 Food Science and Nutrition. Following the launch of the reformed GCSEs, we recommend a review of this qualification to establish whether this is appropriate to be a designated or approved qualification for learners in Wales.
162. Qualifications Wales has identified that, following the reforms to GCSEs which are currently underway, it will, in due course, need to review level 3 provision in Wales.

#### **Section 4: General actions relating to travel, tourism, hospitality and catering**

163. The actions in Section 4 are general actions that cover qualifications across both travel and tourism and hospitality and catering.

##### ***Action 6: Encourage applications for the Competitive Welsh Language Support Grant***

164. We will continue to prioritise, through our Competitive Welsh Language Support Grant, qualifications in full-time programmes of learning for learners aged 14-19 and apprenticeships and will continue to encourage awarding bodies who develop new or replacement qualifications in the sector to apply for this grant.
165. The review noted that while schools, further education colleges and work-based learning providers reported a small number of concerns to us about the availability of qualifications in the medium of Welsh, only one awarding body provided fully bilingual qualifications in this sector. Some awarding bodies have made units available through the medium of Welsh in response to specific demand and are willing to review their Welsh-medium provision further.
166. Following this review, we will continue to meet with the key awarding bodies in the sector to highlight to them the purpose and availability of our Welsh Language Support Grant and encourage those who develop new or replacement qualifications in the sector to apply for this grant.

##### ***Action 7: Links with Careers Wales***

167. Qualifications Wales will share with Careers Wales the findings of the review relating to the provision of careers advice to learners.
168. This review has identified that the poor perception of the industry is having an impact on uptake of qualifications. However, this is a challenge that we cannot overcome by ourselves. Therefore, we will share the findings with Careers Wales and highlight the specific perception challenges identified by the review.

##### ***Action 8: Links with the wider stakeholders***

- 169.** We will share the evidence of the review with Welsh Government, the National Training Federation for Wales (NTFW), ColegauCymru and other relevant bodies, and bring to their attention the findings of the review relating to:
- the need for greater awareness of travel, tourism, hospitality and catering, particularly in schools
  - hospitality and catering apprenticeships to be reviewed (including the entry requirements of apprentices, access to funding, the required length of apprenticeships and the range of experiences that learners needed to cover)
  - the need to encourage links with the industry and all learning providers
  - the challenges of recruiting and retaining specialist teachers, particularly in schools and further education
- 170.** This review has identified some systemic challenges that are having an impact on the effectiveness of qualifications. However, they are challenges that we cannot overcome by ourselves. Therefore, we will share the findings with Welsh Government and other relevant sector bodies such as Regional Skills Partnerships, UK Hospitality, Wales Tourism and Hospitality and Skills Partnership, National Training Federation of Wales, Visit Wales, Wales Tourism Alliance, Culinary Association of Wales and the hoteliers associations, and highlight the specific systemic challenges identified by the review.



## Conclusion

171. Having tested the different options with employers, learning providers, sector experts, awarding bodies and with our Stakeholder Advisory Group, we believe that the actions that we set out in this report would appropriately address, as far as reasonably possible, the issues identified by the review. These actions will allow us to maintain the current strengths of the sector whilst overcoming the specific qualification issues identified by the review. We are confident that the actions set out in the report will significantly strengthen the effectiveness of qualifications in the sector. Following the publication of this report we will, in the early spring of 2023, launch a consultation on our proposal to restrict and commission the hospitality and catering qualifications.





## Acknowledgements

172. We would like to extend a sincere thank you to all those who gave their time to participate in the review and provide such invaluable expertise and insight. Their knowledge and understanding of the sector has helped establish a strong evidence base to structure the report, and their engagement with the review has given us opportunity to test emerging findings and proposed actions. We value every contribution made to support the review. Particular thanks go to the members of our Stakeholder Advisory Group panel (listed below), who provided advice and guidance and constructively challenged our thinking, as well as our sector advisors and additional stakeholders who engaged with the review process so positively.

### Stakeholder Advisory Group

Kathryn Austin – Pizza Hut Group / CMI Cymru  
Sandra Barnard – Estyn  
Chris Bason – Cambrian Training  
Richard Bond – Sector Review Advisor  
Sheena Carlisle – Cardiff Met / NTGA  
David Chapman – UK Hospitality Cymru  
Mark Clement – Gower College Swansea  
Eric Couturier – Sector Review Advisor  
Alaw Dafydd – Coleg Cymraeg Cenedlaethol  
Paul Evans – Coleg Sir Gâr  
Aimee Field – Careers Wales  
Val Hawkins – Mid Wales Tourism  
Geoff Hicks – Welsh Government  
Tracey Israel – Celtic Collection  
Elise James – Sector Review Advisor  
Andrea Jones – Careers Wales  
Helen Lawless – Coleg Gwent  
Jane Lewis – South West and Mid Wales Regional Skills Partnership  
Sian Lloyd Roberts – North Wales Regional Skills Partnership  
Kay Martin – Cardiff & Vale College  
Jill Matthews – British Food Trust  
Lowri Morgans - Coleg Cymraeg Cenedlaethol  
Nikki Neale – Gower College Swansea  
Ceris Probert – Cardiff Met  
Phil Raynsford – Sector Review Advisor  
Kerry Thatcher – Visit Wales / Welsh Government  
Rhiannon Thew – Grŵp Llandrillo Menai  
Linda Thomas – Coleg Sir Gâr  
Arwyn Watkins OBE – NTFW / Cambrian Training  
Huw Wilkinson – Cardiff Capital Regional Skills Partnership  
Simon Wright – Wright’s Food Emporium / Welsh Independent Restaurant Collective

## Appendix 1: List of qualifications included in the technical review sample.

QiW Number	Qualification Title
C00/0679/8	BIIAB Level 2 Certificate In Licensed Hospitality Skills
C00/0679/5	BIIAB Level 2 Certificate In Licensed Hospitality Operations
C00/0587/6	City & Guilds Level 1 Diploma In Introduction to Professional Cookery
C00/0587/9	City & Guilds Level 1 Certificate In Introduction to Professional Food and Beverage Service
C00/0587/8	City & Guilds Level 2 Diploma In Professional Cookery
C00/0588/0	City & Guilds Level 2 Diploma In Professional Food and Beverage Service
C00/0104/6	City & Guilds Level 2 Award in Principles of Customer Service in Hospitality, Leisure, Travel and Tourism
C00/0336/5	City & Guilds Level 3 Award In Hospitality Supervision and Leadership Principles
C00/0341/1	City & Guilds Level 3 NVQ Diploma in Hospitality Supervision and Leadership
C00/0507/4	City & Guilds Level 3 Extended Diploma in Travel and Tourism
C00/0512/7	FDQ Level 2 Diploma In Professional Bakery
C00/0512/8	FDQ Level 3 Diploma In Professional Bakery
C00/0316/7	FDQ Level 2 Certificate for Proficiency in Food Industry Skills
C00/0317/0	FDQ Level 3 Certificate for Proficiency in Food Industry Skills
C00/1234/0	NCFE Level 2 Diploma in Travel and Tourism
C00/1227/9	NCFE Level 3 Introductory Diploma in Travel and Tourism
C00/0577/2	Pearson BTEC Level 1 / Level 2 First Certificate in Hospitality
C00/0577/0	Pearson BTEC Level 1 / Level 2 First Certificate in Travel and Tourism
C00/0255/1	Pearson BTEC Level 3 Extended Diploma in Travel and Tourism
C00/1157/4	WJEC Level 1/2 Vocational Award in Hospitality and Catering
C00/0658/2	WJEC Level 1/2 Vocational Award in Tourism
C00/1157/5	WJEC Level 1/2 Vocational Award in Event Operations
C00/0779/4	WJEC GCSE Food and Nutrition
C00/1177/2	WJEC Level 3 Applied Diploma in Tourism
C00/0726/2	WJEC Level 3 Diploma Food Science and Nutrition
C00/1176/6	YMCA Level 2 NVQ Certificate in Spectator Safety

## Appendix 2: Options analysis for the proposal under Action 4 to commission a new suite of hospitality and catering qualifications

In developing our proposal we considered three options:

- Option 1: to maintain current provisions without changes
- Option 2: to develop approval criteria for a new suite of priority, unrestricted approved qualifications. As many awarding bodies who wanted to submit qualifications for approval would be able to do so
- Option 3: to commission a new suite of priority, restricted approved qualifications. To do so, we would hold a market competition to select a single awarding body to develop bespoke qualifications for Wales

### Option 1: Post-16 hospitality and catering qualifications

To maintain current provision without changes.

#### Benefits of Option 1

As this option is to maintain the current provision with no changes, this option would be less of a financial burden for centres, who would not need to engage in a programme of change management, train staff to deliver new qualifications or explain the changes to the employers they work with. They would also be able to continue to use their current resources. We have also received feedback from some employers that the current qualifications are recognised as the industry standard. This option would also be the least resource intensive for Qualifications Wales and awarding bodies.

#### Disadvantages and risks of Option 1

This option proposes maintaining the current post-16 hospitality and catering qualifications. While a number of these qualifications are offered by the majority of further education colleges and work-based learning providers, evidence from the review suggests that they do not meet the needs of learners and employers. The current qualifications include outdated content, often place too much emphasis on traditional silver service rather than considering more modern-day trends in the hospitality and catering sector, and lack a Welsh context.

### Option 2: Post-16 hospitality and catering qualifications

To develop approval criteria for a new suite of priority, unrestricted approved qualifications. Any awarding body who wanted to submit qualifications for approval would be able to do so.

This option would enable us to specify new qualifications to be made for Wales, based on the need, identified in the review, for a clearer, simpler route through qualifications in hospitality and catering. We would develop these approval criteria along the lines of the model set out in the report.

#### Benefits of Option 2

This option would reduce the number of qualifications available and streamline the qualification offer. It would also provide a route to address the very strong view, and high expectations from stakeholders, including both employers and learning providers, that significant reform is needed.

Developing approval criteria, we would be able to address the findings of the review, including the recommendations for content and assessment. The content of new qualifications would need to be up to date, relevant to industry and to include changes to the industry post the COVID-19 pandemic. The criteria would also require awarding bodies to have addressed the issues identified by the review in relation to assessment.

Including mandatory interpersonal and customer service skills at all three levels of the qualification would address the feedback of both learners and employers, who felt that learners lacked the confidence and 'soft skills' needed to enter the industry.

Qualifications Wales would be able to ensure that all the new qualifications would be available through the medium of Welsh.

### Disadvantages and risks of Option 2

One potential disadvantage of the proposed model is that, by reducing the number of qualifications in hospitality and catering, there may be concerns that the breadth of optional units at level 2 and level 3 may be lost, which could, potentially, impact on progression to the many existing pathways across the hospitality and catering sector.

Significant reform of qualifications is always challenging and replacing the current long-established suite of qualifications with a completely new and different suite would entail considerable change and disruption to centres.

More fundamentally, we have identified that there is a strong likelihood that this option would not elicit the desired market response from awarding bodies to develop and deliver the new qualifications for Wales that we would require. Our discussions with awarding bodies have led us to the view that there is a very high likelihood that, were we to publish approval criteria in the context of an open market, no awarding body would wish to invest in the extent of development required, given the relatively small scale of the market in Wales and where they would be, potentially, competing with other awarding bodies for a small part of a relatively small market.

### Option 3: Post-16 hospitality and catering qualifications

To develop approval criteria for new qualifications as set out in Option 2 but to restrict these qualifications to a single awarding body and commission this development through a fair and open procurement process as restricted priority qualifications.

### Benefits of Option 3

The benefits of this approach include ***all of those outlined in the benefits of Option 2***, but, in this instance, learning providers would be restricted to qualifications being offered by only one awarding body. This would enable an awarding body to develop and deliver the new qualifications with confidence that they would be the only awarding body able to offer them in Wales for a number of years (normally between five and seven years), which would support the longer-term viability of a Made-in- Wales offer. Learner numbers are not sufficient to justify significant development by a number of separate awarding bodies, so, in commissioning, we would be able to give the successful awarding body the confidence to invest in significant reform to meet the needs of learners and employers in Wales.

The contractual arrangements involved in a commissioned suite would also give us at Qualifications Wales a greater control over the final output, including the support provided to centres in managing the qualifications, than regulatory controls alone. This would allow us to have a greater oversight of centre readiness. This would go some way to mitigate the disruption to centres that the introduction of a completely new suite would entail.

Additionally, as the current hospitality and catering apprenticeship qualifications are due to come to an end in 2025, commissioning a new suite of qualifications would secure the market for hospitality and catering apprenticeship qualifications to be available after this date at both level 2 and 3.

### **Disadvantages and risks of Option 3**

As this option includes a restriction, this would not allow for an open market, learning providers would no longer be able to select their own choice of awarding body, and this reduces flexibility in moving between hospitality and catering qualifications offered by current awarding bodies.

We realise that by reducing the number of qualifications in hospitality and catering there may be concerns that the breadth of optional units at level 2 and level 3 may be lost, which could impact on progression to the many existing pathways across the hospitality and catering sector.

As the current hospitality and catering apprenticeship qualifications are due to come to an end in 2025, Qualifications Wales would need to seek an extension to the current qualifications to 2027, which is the earliest first teaching date in our commissioning and development timeline.

Finally, commissioning a new suite of qualifications is a resource-intensive task and the timescale for the new qualifications to be available for first teaching will be longer than if we were to only develop approval criteria for an open market.