



# insight

The research bulletin for London West

## Welcome

*insight* is the research bulletin from London West Learning and Skills Council (LSC) and is produced on a quarterly basis. It provides regular, up-to-date education and labour market information on the London West area, along with insights into current research.

This issue includes a report on the travel-to-study patterns of pupils from London West's six boroughs, the

findings from which will help to inform future funding and provision.

Also featured are a summary of secondary and further education in London West, provisional GCSE and A-level results for 2004, details of equality and diversity impact measures and a profile of one of our key industry sectors: Hospitality.

## Overview

We've taken stock of the secondary and further education currently on offer in London West, as detailed below.

**Further education:** London West has seven further education colleges offering a variety of programmes and courses. These range from general education in academic subjects to vocational education and training, creative and recreational activities, and basic education to remedy disadvantage, such as English for Speakers of Other Languages (ESOL).

**Secondary schools:** there are 130 secondary schools in London West (74 comprehensive schools, 33 independent schools and 23 special schools).

**Sixth forms:** 91 schools in London West have sixth forms (this includes comprehensive, independent and special schools) and the LSC funds 53 of these sixth forms. There are no comprehensive schools with sixth forms in Harrow, but the borough has three further education colleges with comparable provision.

Since September 2000, the total sixth form participation rate in London West has increased by nearly 20% to more than 13,000. The average staying-on rate in London West is 80%.



**Academies:** Ealing, Brent and Hillingdon each have an Academy (a publicly-funded, non-maintained school). A further Academy is scheduled to open in Hillingdon in 2005.

**Specialist schools:** 40 schools in London West have specialist status (meaning that they have a special focus on their chosen subject area).

## CONTENTS

Planning for tomorrow:  
travel-to-study patterns

Page 2

Overcoming barriers: women  
returners with young children

Page 6

Education and achievement:  
provisional results for 2004

Page 5

Equality and diversity  
impact measures

Page 7

Sector profile: Hospitality

Page 9



Learning+Skills Council  
London West

# Planning for tomorrow: travel-to-study patterns

In order to be able to plan provision appropriately in the future, we wanted to gain a clear picture of the travel-to-study patterns of pupils across London West's six boroughs. The results of our research are shown below.

A total of 42,130 pupils aged between 14 and 18 (Years 10 to 14) were educated in the London West area during the academic year 2003-04. Within this figure, 89% of pupils were aged between 14 and 16.

It is important to note that in each of London West's six boroughs, at least 85% of pupils aged 14 to 16 live and go to school within the same borough. The analysis shown below focuses on all pupils aged 14 to 18.

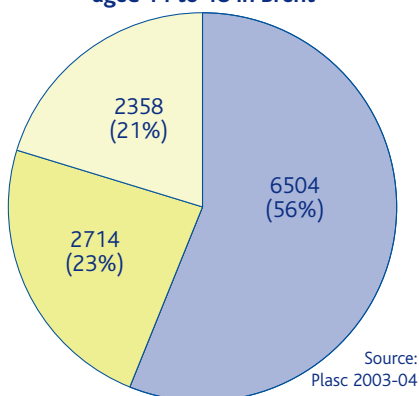
Number of pupils (14-18) attending schools in the London West LEAs			
London West LEA	Female	Male	Total
Brent	4337	4525	8862
Ealing	3945	3723	7668
Hammersmith & Fulham	1783	1915	3698
Harrow	2193	2334	4527
Hillingdon	4372	4308	8680
Hounslow	4448	4247	8695
Total	21,078	21,052	42,130

The table above shows that Brent, Hillingdon and Hounslow local education authorities (LEAs) each have around 21% of the total number of Year 10 to 14 pupils in London West.

## Brent

Most Brent pupils (56%) live and study in their own LEA schools. Those schools with the largest intake of pupils residing in the same borough include Copland Community School & Technology Centre Foundation (15%), Kingsbury High School (13%) and Preston Manor High School (10%).

Travel-to-study patterns of pupils aged 14 to 18 in Brent



Within the group of pupils who live in the borough of Brent but study elsewhere: 31% attend schools within Barnet LEA (mainly St James' Catholic High School and St Mary's CofE High School); and 15% attend schools within Camden LEA (mainly Hampstead School and La Sainte Union Catholic Secondary School).

### Key to pie charts

- Living in and studying in the borough
- Living in and studying outside the borough
- Living outside and studying in the borough

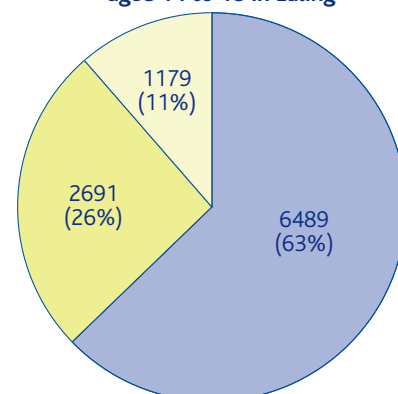
Only a small proportion of pupils (21%) live outside of the borough of Brent but study within a Brent LEA school. Most of the pupils within this category live in neighbouring boroughs – Harrow (32%), Barnet (25%) and Ealing (10%) – see chart below.

The main schools in Brent attended by pupils living in Harrow, Barnet and Ealing		
Harrow	Barnet	Ealing
Claremont High School	JFS School	Alperton Community School
St Gregory RC High School	Kingsbury High School	Wembley High Technology College
JFS School		Copland Community School & Technology Centre Foundation

## Ealing

The majority of pupils (63%) living in the borough of Ealing also study in Ealing LEA schools – those with the largest intake of pupils residing in the same borough include Greenford High School (13%), Drayton Manor High School (12%) and The Cardinal Wiseman Roman Catholic School (10%).

Travel-to-study patterns of pupils aged 14 to 18 in Ealing



Amongst the group of pupils who live in Ealing borough but study outside of this borough, 47% study in schools within Hounslow LEA and 16% within Hillingdon LEA. Schools in Hounslow LEA attended by pupils living in Ealing include Gunnersbury High School, Cranford Community College and Gumley House RC Convent School FCJ. Schools in Hillingdon LEA attended by pupils living in Ealing include The Douay Martyrs Roman Catholic School and Barnhill Community High School.

Only a small proportion of pupils (11%) live outside of the borough of Ealing but study within an Ealing LEA school. The majority of them live in neighbouring boroughs, including Hillingdon (29%), Brent (19%) and Hounslow (15%). The chart below shows the three main schools attended in Ealing LEA by these pupils.

The main schools in Ealing attended by pupils living in Hillingdon, Brent and Hounslow		
Hillingdon	Brent	Hounslow
The Cardinal Wiseman Roman Catholic School	The Ellen Wilkinson School for Girls	Elthorne Park High School
Greenford High School	Twyford Church of England High School	Featherstone High School
Northolt High School	The Cardinal Wiseman Roman Catholic School	Greenford High School

## Hammersmith & Fulham

Around 32% of pupils living in the borough of Hammersmith & Fulham also study in the same borough. The schools located in Hammersmith & Fulham LEA with the highest intake of pupils living in the same borough are William Morris Academy (24%) and Hurlingham and Chelsea Secondary School (16%).

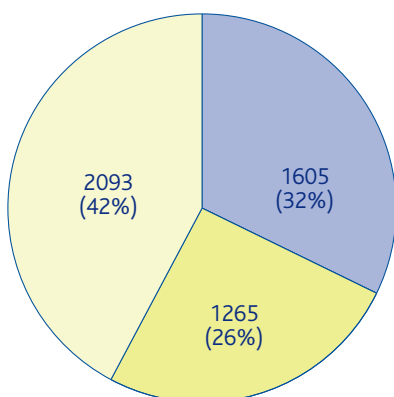
Within the group of pupils who live in Hammersmith & Fulham but study outside of the borough, 30% study in schools within Hounslow LEA and 20% of pupils study in schools within Kensington and Chelsea LEA.

Schools in Hounslow LEA attended by pupils living in Hammersmith & Fulham include Chiswick Community School and Gunnersbury High School. Schools in Kensington and Chelsea LEA attended by pupils living in Hammersmith & Fulham include Holland Park School and The Cardinal Vaughan Memorial RC School.

Interestingly, there is a higher proportion of pupils (42%) who live outside of the borough of Hammersmith & Fulham but study within the schools in this borough. Most of these pupils participating in education within Hammersmith & Fulham LEA schools live in neighbouring boroughs, including: Kensington and Chelsea (22%), Ealing (15%) and Wandsworth (14%). The three main schools attended in Hammersmith & Fulham LEA by these pupils are shown in the table below.

The main schools in Hammersmith & Fulham attended by pupils living in Kensington & Chelsea, Ealing and Wandsworth		
Kensington & Chelsea	Ealing	Wandsworth
Burlington Danes CofE School	William Morris Academy	Lady Margaret School
William Morris Academy	The London Oratory School	The London Oratory School
Henry Compton Secondary School	Sacred Heart High School	Hurlingham and Chelsea Secondary School

Travel-to-study patterns of pupils aged 14 to 18 in Hammersmith & Fulham



## Harrow

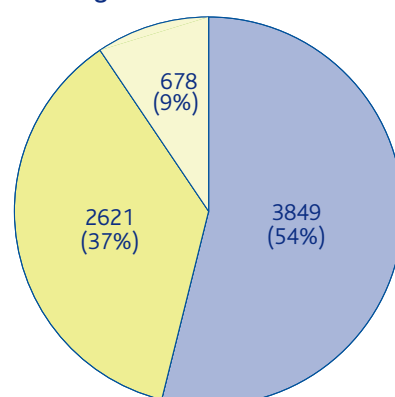
Most pupils (54%) living in the borough of Harrow also study in Harrow LEA schools. The schools located in Harrow LEA with the largest intake of pupils residing in the same borough include Hatch End High School (15%), Park High School (14%) and Nower Hill High School (14%).

Amongst the group of pupils who live in the borough of Harrow but study outside of this borough, 29% study in schools within Brent LEA and 21% of pupils study in schools within Hillingdon LEA. Schools in Brent LEA attended by pupils living in Harrow include Claremont High School and St Gregory RC High School. Schools in Hillingdon LEA attended by pupils living in Harrow include Haydon School and Bishop Ramsey Church of England Voluntary Aided Secondary School.

Only a small proportion of pupils (9%) live outside of the borough of Harrow but study within a Harrow LEA school. Most of these live in neighbouring boroughs including: Brent (45%), Ealing (17%) and Hillingdon (12%). The main schools attended in Harrow LEA by these pupils are detailed in the table below.

The main schools in Harrow attended by pupils living in Brent, Ealing and Hillingdon		
Brent	Ealing	Hillingdon
Canons High School	Rooks Heath High School	Nower Hill High School
Salvatorian Roman Catholic College	Salvatorian Roman Catholic College	Rooks Heath High School
Harrow High School		

Travel-to-study patterns of pupils aged 14 to 18 in Harrow



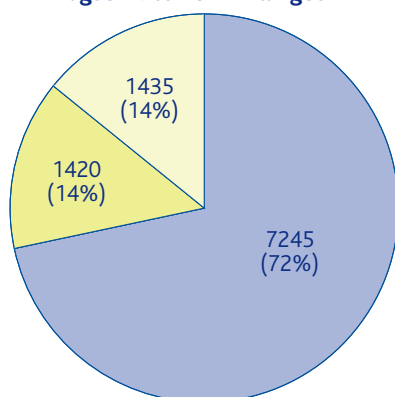
### Key to pie charts

- Living in and studying in the borough
- Living in and studying outside the borough
- Living outside and studying in the borough

## Hillingdon

The majority of pupils (72%) living in the borough of Hillingdon also study in Hillingdon LEA schools. The schools located in Hillingdon LEA with the highest intake of pupils living in the same borough include Haydon School (9%), Mellow Lane School (9%) and Harlington Community School (8%).

Travel-to-study patterns of pupils aged 14 to 18 in Hillingdon



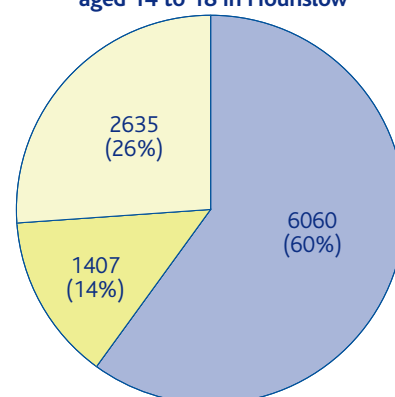
Within the group of pupils who live in the borough of Hillingdon but study outside of this borough, 24% study in schools within Ealing LEA and 21% study in schools within Hounslow LEA. Schools in Ealing LEA attended by pupils living in Hillingdon include The Cardinal Wiseman Roman Catholic School and Greenford High School. Schools in Hounslow LEA attended by pupils living in Hillingdon include St Mark's Catholic School and Cranford Community College.

Around 14% of pupils live outside of the Borough of Hillingdon but study in a Hillingdon LEA school. This is the same percentage as for those pupils who live in Hillingdon but study outside of the area. Most pupils participating in education within Hillingdon LEA schools live in neighbouring boroughs including Harrow (39%) and Ealing (29%). The main schools attended in Hillingdon LEA by these pupils are detailed in the table below.

## Hounslow

Most pupils (60%) living in the borough of Hounslow also study in Hounslow LEA schools. The schools located in Hounslow LEA with the highest intake of pupils living in the same borough include The Heathland School (14%), Lampton School (9%) and Feltham Community College (9%).

Travel-to-study patterns of pupils aged 14 to 18 in Hounslow



Amongst the pupils who live in the borough of Hounslow but study outside of this borough, 37% study in schools within Richmond upon Thames LEA and 26% study in schools within Surrey LEA. Schools in Richmond upon Thames LEA attended by pupils living in Hounslow include Hampton Community College and Orleans Park School. Schools in Surrey LEA attended by pupils living in Hounslow include St Paul's Catholic College and The Bishop and Church of England Secondary School.

Around 26% of pupils live outside the borough of Hounslow but study in a Hounslow LEA school. Most of these pupils live in neighbouring boroughs, including Ealing (49%), Hammersmith & Fulham (14%) and Richmond Upon Thames (14%). The main schools attended in Hounslow LEA by these pupils are shown in the table below.

The main schools in Hillingdon attended by pupils living in Harrow and Ealing	
Harrow	Ealing
Haydon School	The Douay Martyrs Roman Catholic School
Bishop Ramsey CofE Voluntary Aided Secondary School	Barnhill Community High School
Northwood School	Bishop Ramsey CofE Voluntary Aided Secondary School

The main schools in Hounslow attended by pupils living in Ealing, Hammersmith & Fulham and Richmond Upon Thames		
Ealing	Hammersmith & Fulham	Richmond upon Thames
Gunnersbury Catholic School	Chiswick Community School	Gumley House RC Convent School RCJ
Cranford Community College	Gunnersbury Catholic School	St Mark's Catholic School
Gumley House RC Convent School RCJ	Brentford School for Girls	The Heathland School

### Key to pie charts

- Living in and studying in the borough
- Living in and studying outside the borough
- Living outside and studying in the borough

# Education and achievement: provisional results for 2004

While the Government is busy digesting the recommendations of the Tomlinson Committee on the future of 14-19 qualifications, the latest batch of examination results from 2004 appears to show that progress towards some of the public service agreement (PSA) targets has stalled.

## GCSE results

In order to reach the key target of 60% of all 16-year-olds achieving the equivalent of five good GCSEs (grades A\* to C) by 2008, the national year-on-year increase to 2006 needed to be 2%. However, for 2004, the increase was just under 1%.

The percentage of young people with passes in Mathematics and English has slipped back on previous figures: down from 86.6% the previous year to 86.4%. The total number of LEAs to have met their goal for five good GCSEs (38% of 16-year-olds) is also below target.

Although London West's six boroughs are all comfortably above the minimum GCSE target level, overall progress since last year is uneven.

Two of our six boroughs – Brent and Harrow – have improved their results over 2003, with Harrow just below the 60% PSA target. Only six of the 32 London boroughs have achieved that target.

In the remaining four London West boroughs, results for 2004 are down on those a year ago. Hammersmith & Fulham has fallen below the 50% mark for five good GCSEs for the first time since 1999, while Hillingdon remains the sole London West borough not to surmount that 50% level. It is noteworthy that the percentage of young people without a GCSE pass in Hillingdon is high, even for a London LEA, and has climbed back to its current level after improvements in the early years of this century.

It is perhaps premature to infer trends based on the results of one year. If we look back to the mid-1990s, out of London West's boroughs only Harrow had a good GCSE pass rate of more than 50% and several were no higher than 35%. The improvements made, therefore, have been substantial. Moreover, the proportion of 15-year-olds with no passes has also fallen significantly: the London West average in 1996 was 7%, whereas today it is just over 4%.

Nevertheless, it is important to monitor the situation over the next couple of years, in order to be able to judge whether there has been a real reversal in achievement or just a temporary halt to the general upward trend.

GCSE passes 2004: percentage of all pupils aged 15			
	5+ A* to C	5+A* to G	Zero passes
England	53	89	4
London	52	89	4
Brent	53	91	4
Ealing	52	90	3
Hammersmith & Fulham	48	89	4
Harrow	59	92	3
Hillingdon	47	86	7
Hounslow	51	89	4

## A-level results

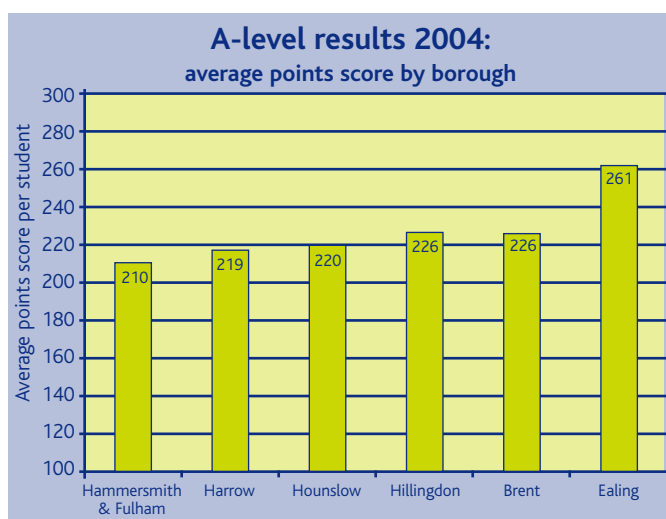
The changes to the way that points scores are calculated mean that we cannot compare results over a number of years. We can, however, make comparisons with schools both in the London Region and nationally, and consider trends for a limited timescale.

The chart below shows that four of the six London West boroughs have points scores that do not differ significantly. The two exceptions are Ealing, which continues to be our best performing borough, and Hammersmith & Fulham, which has seen a decrease in its achievements this year. The most improved borough is Hounslow, where there has been a 12% rise in the overall points score.

With the exception of Ealing, London West's boroughs are all below the average for London – currently 229 – and trail the England average, which stands at 266.

Although it has been cited many times, the difference in achievement at A-level between male and female students is still striking. In London, for example, the average points score for females is 238, while for males it is 219.

There is a 20 percentage point discrepancy in England according to gender and in London this figure is – at 19 percentage points – almost as high. Ealing and Hounslow (where the difference is 29 and 23 percentage points respectively) appear to owe their improved rates largely to successful results from young women. Only in Brent is the gap, at two percentage points, barely perceptible. This is clearly a national issue but the situation in London West is, if anything, more evident than across the country as a whole.



All these results are provisional. We must emphasise that outcomes can change for reasons such as adjustments for overseas students or individual and institutional amendments. We will be providing final results, together with some analysis by school, in the next issue of *insight*.

# Overcoming barriers: women returners with young children

**Women with young children face numerous barriers when accessing learning, training and employment, which has resulted in them being under-represented in the workplace and disadvantaged by low pay and concentration in certain sectors.**

Financed by London West LSC through the European Social Fund, Brunel University undertook a nine-month study, culminating in a research report published in August 2004: *The Training Needs of Women with Children under five*.

## Background and methodology

The Government's Success for All strategy requires all local LSCs to ensure that the learning and training they fund meet the needs of learners, employers and communities in their area. Employers will need a range of people to fill the identified skills gaps, including those from previously untapped groups, particularly women with young children.

The aim of the study was to assess the training needs of women with children under five years old. We wanted to find out what skills they would need to acquire in order to meet employer requirements, and to learn more about the barriers to learning and training that they are experiencing.

In order to achieve this, a variety of research methods were used, including a literature and policy review, analysis of census data, in-depth interviews with training and information providers, and focus groups with women who had children under five.

## Key findings

The research study shows that most women do want to participate in training and, eventually, to return to paid employment.

The report's findings reveal that the barriers to learning and training faced by women with young children are numerous, wide-ranging and complex. These barriers differ along lines of age, marital status, immigration status, number and age of children, area of residence, ethnicity, religion and disability.

Key findings from the research can be summarised as follows:

- **Perceptions** – learning and training have positive connotations among the target group, and are associated with improved employment opportunities and personal development
- **Barriers** – many things were seen to deter participation, including affordable and suitable childcare, lack of confidence, costs associated with learning, a restricted range of mother-friendly and financially adequate jobs, limited variety in training, course timings, bureaucracy, familial and cultural restrictions, and an absence of UK-based work experience or recognised qualifications among refugee women
- **Information** – training providers should ensure that they include details important to mothers of young children in the information they disseminate, such as fee structure, course timings, availability of low-cost childcare and progression routes. Personal contact and word-of-mouth are far more effective than leaflets in engaging the target group

- **Interest in training** – this rises when childcare issues are partly resolved, often when the youngest child goes to nursery or school. For some women, the immediate need to take up employment overrides any consideration of longer-term training needs
- **Motivations** – these can be personal and professional
- **Training provision** – family learning is an effective method of engaging mothers in training and can help challenge negative perceptions and experiences of learning; estate-based and community learning are local, convenient and popular; taster courses provide an opportunity for learners to make an informed decision; and mentoring is effective in raising retention rates, particularly among first-time learners
- **Pressures to work and train** – these stem from a variety of sources, including the women themselves, their family, the high costs of living and recent Government initiatives such as the New Deal for Lone Parents.

## Recommendations

In order to achieve the objectives of the Government's Skills Strategy – and to help close the skills gap within London West – it is important to recognise and address the training needs of women with children under five. In the longer term, this will help ensure a more inclusive learning environment and socially inclusive society.

The recommendations for consideration by the LSC and partner agencies include:

- Setting up a range of routes into training, delivered by local providers throughout London West's six boroughs
- Encouraging progression through training
- Countering negative perceptions of training through the use of effective role models and provider-organised visits to local colleges
- Running face-to-face training needs consultation seminars for the target group, through local community organisations
- Offering a range of courses and encouraging providers to introduce subsidies
- Minimising bureaucracy
- Producing regular, area-based information bulletins covering all training opportunities, including details about support facilities (particularly childcare), cost and available funding
- Providing effective career guidance.

The report also contains a number of policy-based recommendations aimed at the Government, particularly the Department for Education and Skills, The Department for Work and Pensions, and the Department of Trade and Industry.

To download a copy of the report, visit [www.londonwest.org/research](http://www.londonwest.org/research)



# Equality and diversity impact measures

London West LSC was one of the six pioneering local LSCs to have initiated equality and diversity impact measures (EDIMs) in work-based learning, further education and Adult and Community Learning (ACL).

The National LSC vision is that, by 2010, young people and adults in England will have knowledge and productive skills to match the best in the world. This vision can only be achieved through a proactive and sustained commitment to equality and diversity.

Introduced by the National LSC in 2002, EDIMs aim to address key equality and diversity issues prioritised by local LSCs through their needs analysis and strategic planning activities. EDIMs measure the participation, retention and achievement levels of learners from local groups currently under-represented or underachieving in learning provision. Inequalities based on age, sex, race, disability, geographical area or occupational sector are identified through data analysis and then addressed by agreeing targets with providers and monitoring progress.

The diverse nature of the local population means that EDIMs are particularly relevant in London West: almost half of all residents class themselves as Non-White (the national average is 13%); and Ealing – Southall Broadway is the only ward in England with a White British population of less than 10%.

EDIMs are regularly reviewed and monitored in order to track progress and ascertain if any new measures need to be introduced.

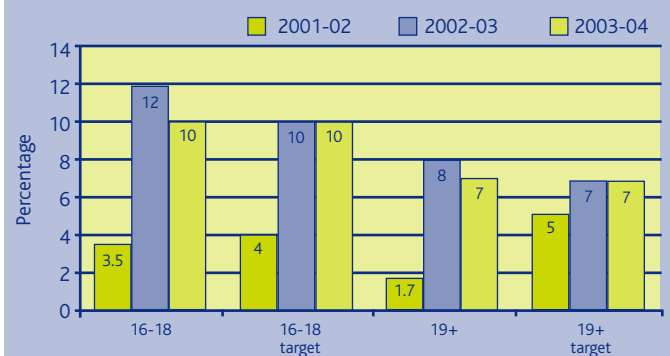
## Work-based learning

Work-based learning data from 2001 were used to establish baselines from which to set measures for improvement.

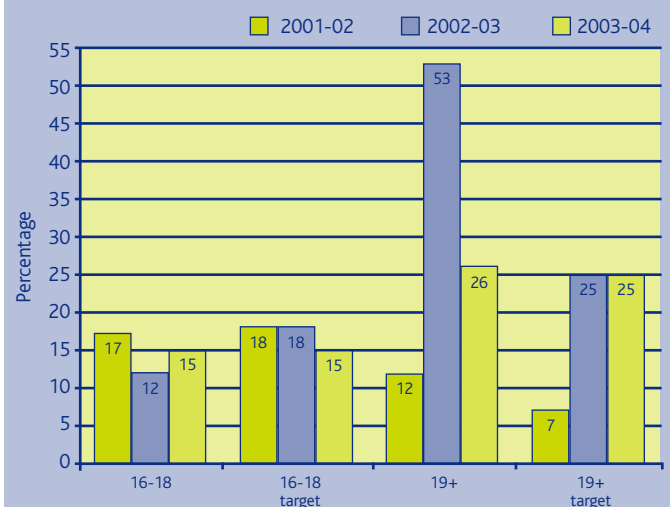
Five EDIMs are currently used to address the following identified priorities: gender imbalance in Health and Social Care, Construction and Engineering; under-representation of young people with learning difficulties and disabilities; and under-representation of ethnic minorities in Construction.

Figures 1 and 2 show trends against target for two of these EDIMs. Data inconsistencies and the changing profile of work-based learning providers have meant that monitoring progress has been a complicated task.

**Figure 1 – Participation of young people with disabilities on work-based learning programmes (progress against targets)**



**Figure 2 – Participation of ethnic minority learners in construction**



Source: ILR data

## Further education

The analysis of local further education colleges' participation and success rates by ethnicity did not identify any inequalities that could be used to set an overall ethnicity-related EDIM for London West LSC. We therefore agreed with the colleges concerned that they would continue to monitor the impact of their equal opportunities policies by setting their own EDIMs, which would then be monitored through performance reviews.

Following a recent review of EDIMs, we have also decided to extend the monitoring of gender balance in Construction and Engineering, along with the ethnic profile of learners in Construction from the work-based learning to the further education sector, because our analysis shows that we need to increase participation of:

- Female learners in Construction (currently at 8%)
- Female learners in Engineering (currently at 3%)
- Ethnic minority learners in Construction (some ethnic categories currently show participation rates of under 1%).

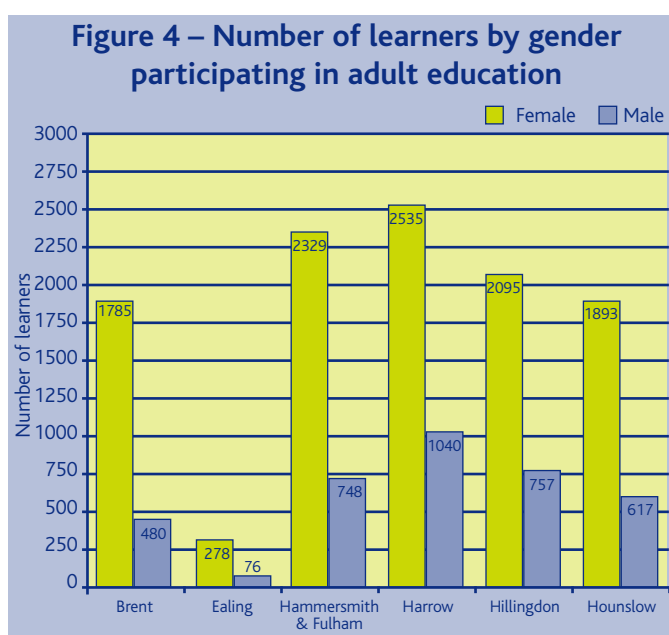
One of the further education EDIMs currently being developed is progression from English for Speakers of Other Languages (ESOL) to other mainstream vocational and academic courses. Following a successful pilot project, financed through the Local Investment and Development Fund, where ESOL students were given enhanced guidance to help them progress in this way, we are currently looking at the cost implications of developing a similar service across all six London West boroughs.

Although EDIMs are designed to address the under-representation and underachievement in learning provision that usually affects the ethnic minority population, Figure 3 below shows that the participation of the White UK population in further education is disproportionately low.

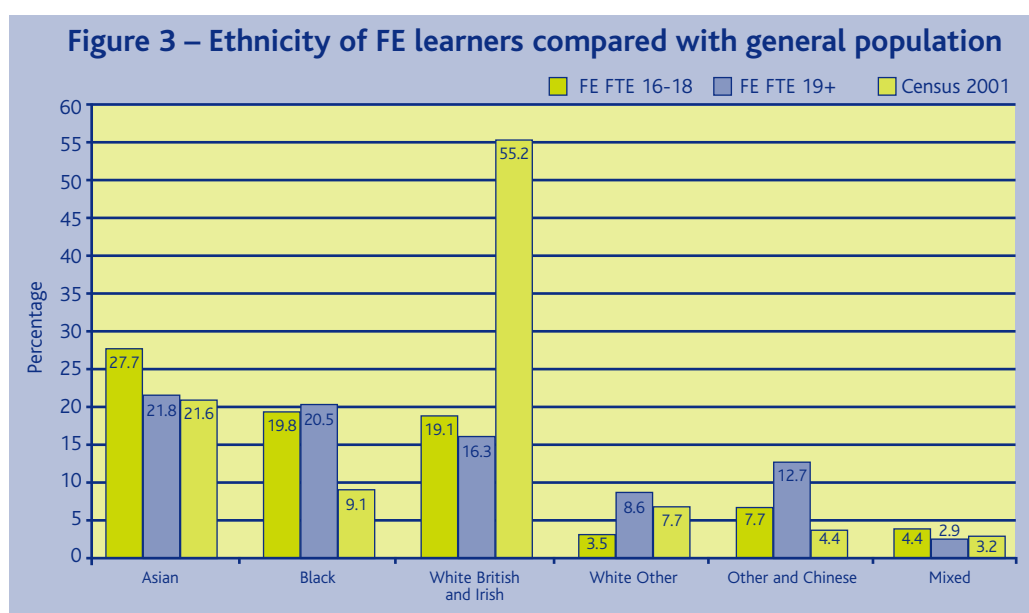
## Adult and Community Learning

In line with the National LSC's Widening Adult Participation Strategy, London West LSC's ACL team regularly collects data to identify under-represented groups so that local priorities continue to reflect local needs and realities. All our local ACL providers produce termly data on: participation of learners with learning difficulties and disabilities; gender ratio; participation of learners by ethnicity and by age.

During 2004-05, London West's ACL providers will use this data to identify and address gaps in adult participation. Figure 4 shows that there is a gender imbalance in ACL provision – all six boroughs are currently working to address this.



Source: A01 2003-04



Source: ILR data and Census 2001



# Sector profile: Hospitality

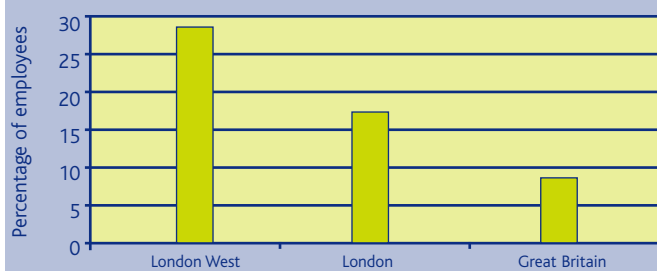
**Hospitality is one of London West's priority industrial sectors. In recent times it has seen a remarkable increase and continues to be one of the fastest growing sectors in the area.**

Encompassing a variety of businesses, the main focus of the Hospitality sector is restaurants, bars and hotels.

Activity within the Hospitality sector is very much linked to tourism and international travel. The presence of Heathrow is of course a major factor; a part of the Heathrow economy, the sector is affected by changes in global conditions, patterns of travel and competition in terms of world tourism. Hospitality is also linked to leisure activity, and in this sense it is very much driven by levels of business and consumer confidence, stemming from the overall state of the economy.

Just over 7% of employees in London work in hotels and restaurants, a similar proportion to that for the London West area where 49,352 people are employed in the Hospitality sector<sup>1</sup>. In recent years there has been a significant increase in the number of employees in the sector, and this has been particularly marked in the London West area.

**Percentage increase in employees in hotels and restaurants 1998-2002**

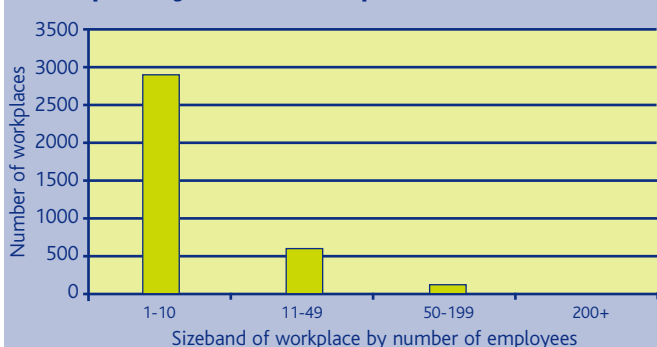


Source: Annual Business Inquiry 2002

In 2000 and 2001 the pace of growth in the Hospitality sector slowed somewhat, affected by reduced business and tourist travel and therefore demand for hotels and restaurants. 2002 showed a return to growth with a 7.1% increase in employees<sup>1</sup>. In 2003, 33% of businesses reported an increase in turnover, with 39% staying the same and 29% noting a decrease<sup>2</sup>. Within London West, significant further opportunities are planned, for example at the new Heathrow terminal.

The Hospitality sector comprises a diverse range of businesses, including a small number of very large hotel and catering groups, some of which operate on a world-wide scale, and at the other end of the spectrum a large number of small, independent businesses.

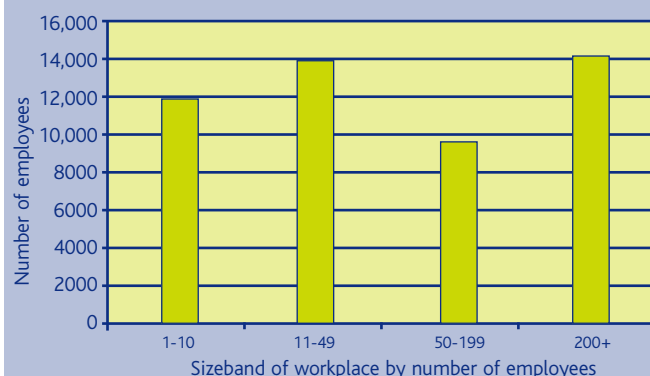
**Hospitality sector workplaces: London West**



Source: Annual Business Inquiry 2002

Although most businesses in the sector are small, the proportion of employees in workplaces of 200+ in London West is substantial (28%), higher than for London (14.9%) and for Great Britain as a whole (7.2%), and reflects the presence of large national and international hotels and restaurants in the area.

**Hospitality sector employees: London West**



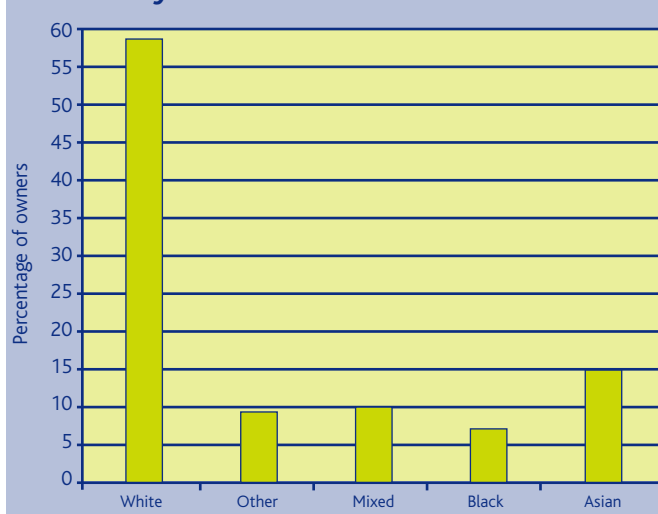
Source: Annual Business Inquiry 2002

This is also demonstrated in the relatively high proportion of multiple site businesses, with 59% of hotel and catering establishments belonging to a multiple site organisation<sup>2</sup>.

There were 2555 VAT-registered companies in the hotels and restaurant sector in London West in 2002, accounting for 5.2% of the total number registered. In 2002 there were 395 de-registrations and 410 new registrations, a net increase of 15.

A noticeable aspect of the sector is the relatively high proportion (41%) of owners from ethnic minority groups.

**Ethnicity of owners: hotels and restaurants**



Source: London Annual Business Survey 2003

## Key issues and trends

The Hospitality sector in London West is vulnerable to global trends and conditions that can influence the number of overseas tourists and travellers. For example, in recent years the sector has been affected by apprehension about terrorism and uncertainty generated by the war in Iraq. Other factors include the strength of sterling, which can reduce the number of overseas visitors, and general world competition for international tourism.

How the sector performs is also closely linked to general levels of business and consumer confidence. The increase in disposable income over the past few decades has fuelled the growth in hospitality, as more money is spent on leisure activities and the number of holidays taken has increased. Other lifestyle changes impact on the sector, such as the trend towards eating out more, and demographics like the increased prosperity among older sections of the population and greater ethnic diversity. Within the industry there have been significant developments in response to changing consumer demand, including branded restaurants, themed pubs, special-interest short-break holidays and more culturally-related hospitality.

Some of the other key drivers of change in the Hospitality sector in the area are local clustering at retail/leisure centres; cost reduction; technological changes and use of the internet<sup>3</sup>. The internet, for example, supports competition and expansion, with in-depth information and facilities increasingly available online. As with other developments, this has an associated demand on workforce skills requirements.

While there remains a vulnerability to changing global events, there are many indications that growth will continue in the future. Hotels and restaurants is one of the three sectors where it is anticipated there will be growth in London over the next 12 years. Forecasts are for an increase of 141,000 jobs by 2016, with the sector increasing its share of employment from 7% to 9%<sup>2</sup>.

Significant developments in London West include the building of the new Terminal 5 at Heathrow, which will provide a substantial number of new employment opportunities in the Hospitality sector; developments at White City, where broadcasting facilities will merge with leisure and retail opportunities; and Wembley, where increased opportunities will arrive from the redevelopment of the stadium and associated facilities.

## Workforce

Within London West, proportionally more men work in the sector and there is less part-time working, as compared to Great Britain as a whole.

	London West	Great Britain
Women in sector	49.6%	57.6%
Part-time work	37.6%	57.6%
Women part-time workers	56.0%	65.9%

Source: Annual Business Inquiry 2002

The sector also employs fewer young people in the area compared to the country as a whole, and has a higher-than-expected proportion of ethnic minority workers<sup>4</sup>.

Hospitality offers a huge range of jobs and different types of employment opportunity. The vast majority of businesses are restaurants and other catering establishments, and this is where most of the sector's workforce is employed. The substantial growth in the sector has led to many employers now offering competitive recruitment packages. While it is large firms that tend to offer enhanced packages, the attraction of smaller businesses is that they can sometimes offer more autonomy and faster progression than their larger competitors.

Notwithstanding the significant changes within the sector, it undoubtedly still is the case that it suffers from a poor image of unsociable hours and low pay<sup>5</sup>. There are skills shortages and vacancies in many parts of the industry, and hotels and restaurants showed the highest ratio of vacancies per jobs in the UK in the first quarter of 2004. A further aspect is that hospitality staff have skills that are very transferable, and within the sector there is significant staff turnover and movement. The proportion of employees covered by collective trade union agreements in the sector is 9% – the lowest of any industrial sector and substantially less than the 36% for the whole workforce<sup>6</sup>.

Despite the challenges there is widespread recognition that hospitality is a particularly important source of entry-level jobs and a pathway to employment for many groups facing labour market disadvantage. Also, a relatively low proportion of employment in hospitality is taken up by commuters into London<sup>4</sup>. This is significant: growth in the sector therefore has a big impact on London's residents.

## Skills

The sector faces a considerable skills challenge with an increasing gap between the workforce skill level and the requirements of the demand-driven hospitality industry today. The workforce is characterised by low skill levels and in London the average qualification is an NVQ level 2.3<sup>4</sup>. Industry reports highlight that the proportion of the workforce without qualifications is actually increasing<sup>5</sup>, and there are reported low levels of literacy and numeracy among significant numbers of the workforce. It is notable that a greater percentage of waiting and bar staff have higher qualification levels than those in managerial occupations, and this partly reflects the number of undergraduates and graduates working in the sector as a temporary measure.

Nearly a quarter of the workforce has 'other qualifications' – these represent mostly industry-specific qualifications. Regulations and requirements around food hygiene and health and safety drive much of the industry training, along with other programmes such as sugarcraft and bakery.

Significantly, however, rising customer expectations and increased market competition are demanding greater levels of skills in literacy, numeracy, customer care, marketing, problem solving and team working. New developments are also leading to new skill requirements – an important one is the need for IT skills at all levels, from basic to advanced. The pace of change within the sector is also demanding an increasingly flexible workforce. Employers are becoming more aware of skill deficiencies, both within the existing workforce as well as potential recruits, and of the need for a more effective range of management skills.

The Hospitality Training Foundation recently joined with other organisations to form the new Sector Skills Council for Hospitality, People 1st. There are plans for a programme of work to increase employer engagement in skills issues and work towards meeting the future skills needs of the sector<sup>8</sup>.

Within London West there is a Centre of Vocational Excellence, providing training in catering at Thames Valley University. This is linked to many of the hospitality industry opportunities around Heathrow.

1 Annual Business Inquiry 2002

2 London Annual Business Survey 2003

3 Understanding London's Sub-regional Economies, LDA 2003

4 Understanding London's Sectors, LDA, 2003

5 Labour Force Survey 2004

6 Labour Market Trends 2002

7 Labour Force Survey 2002

8 Hospitality Training Foundation, Sector Skills Council for Hospitality

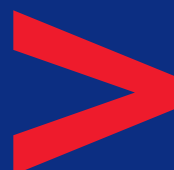


Research Team  
London West Learning and Skills Council  
Central House,  
Lampton Road  
Hounslow  
Middlesex  
TW3 1HY

*insight* is produced on a quarterly basis.  
For enquiries relating to this research bulletin,  
contact Martin Freedman, Head of Research.  
Telephone: 020 8929 8483 Fax: 020 8929 8403  
E-mail: [martin.freedman@lsc.gov.uk](mailto:martin.freedman@lsc.gov.uk)  
*insight* can also be viewed on the website:  
[www.londonwest.org](http://www.londonwest.org)

© December 2004 London West LSC

Ref: 307/11/04



**Learning+Skills Council**  
London West