

LICHFIELDS



Solent Local Skills Improvement Plan

Hospitality Sector | Deep Dive Evidence Report

FINAL REPORT

June 2025

1.0 Introduction

The Solent LSIP brings together employers, colleges, training providers and other stakeholders to set out the key changes needed to make skills training in the region more responsive to employers' needs. This 'deep dive' considers the demand and supply of skills needed to support a thriving hospitality sector in the Solent, both now and in the future.

1.1 Introduction

This evidence report has been prepared by Lichfields on behalf of the Hampshire Chamber of Commerce ('CoC') to provide a focused 'deep dive' analysis of the hospitality sector within the Solent region, paying particular attention to the current and future skills needed to support the growth of the sector.

This report includes analysis of the demand and supply of skills needed to support a thriving hospitality sector, in addition to a review of existing training provision within the Solent.

Ultimately, this report seeks to identify and highlight the skills gaps impacting the hospitality sector and sets out a series of recommendations designed to support the Hampshire CoC (designated as the region's employer representative body, or 'ERB', by the Department for Education, or 'DfE'), local training providers and other stakeholders across the Solent shape the local skills agenda through the Solent Local Skills Improvement Plan ('LSIP') process.

1.2 Defining the hospitality sector

The hospitality sector is a key contributor to the UK economy and accounts for approximately 8.1% of all employment nationally. For the purposes of this report, the definition of the sector incorporates traditional hospitality and accommodation activities (incl. the restaurant and hotel sectors), in addition to a range of related activities as outlined overleaf.

Solent LSIP Overview

The Solent LSIP brings together employers, colleges, training providers, and other stakeholders to set out the key changes needed to make technical skills training in the Solent more responsive to employers' needs. The LSIP seeks to tackle skills deficits by building on existing and new levels of collaboration, establishing stronger relationships with businesses, and providing practical solutions which aim to transform the Solent's technical skills landscape.

The Solent LSIP identifies 6 key priorities to take forward. Designed to be cross-cutting and applicable to the full range of employment sectors in the Solent (incl. hospitality), these priorities seek to address a number of economy-wide challenges identified via engagement with stakeholders and local employers.

Priority 1:
Awareness and aspiration

Priority 2:
Navigating the skills ecosystem

Priority 3:
Proactive employer engagement

Priority 4:
A more agile ecosystem

Priority 5:
Pathways to skills

Priority 6:
Managing the skills transition

1.0 Introduction

The hospitality sector incorporates a mix of hospitality and accommodation activities, in addition to a range of activities related to food and beverage, catering services, event management, cultural and recreational activities.

While the contribution of each activity identified will vary (i.e. in terms of the economic value generated, the level of employment supported and skills profile), this deep dive seeks to include both core and ancillary activities related to the sector to ensure that the full range of skills requirements are considered.

By addressing the full spectrum of skills needed, hospitality businesses in the Solent can therefore ensure they have a strong workforce that meets demand changes, is better positioned to retain talent, and benefit from the sector's recovery to pre-pandemic levels. The list of activities in hospitality considered within this deep dive includes:

- Hotel and related activities;
- Restaurant and related activities;
- Catering;
- Event management; and
- Cultural and recreational activities.

The above definition excludes employment related to agency activities (i.e. particularly SIC 78.1 : Activities of employment placement agencies and SIC 78.2 : Temporary employment agency activities) as it has not been possible to quantify the proportion of roles within hospitality to which these occupations contribute.

Activity	Sub-sectors
Hotel and related	<ul style="list-style-type: none">• Hotels and similar accommodation• Holiday and other short stay accommodation• Camping grounds, recreational vehicle parks and trailer parks• Other accommodation
Restaurant and related activity	<ul style="list-style-type: none">• Licenced restaurants• Unlicensed restaurants and cafes• Take away food shops and mobile food stands• Licensed clubs• Public houses and bars
Catering	<ul style="list-style-type: none">• Event catering activities• Other food services activities
Event management	<ul style="list-style-type: none">• Convention and trade show organisation
Cultural and recreational activities	<ul style="list-style-type: none">• Amusement and recreations activities

Further detail about the sector's definition is set out in Appendix 1. Wherever possible, the analysis presented in this report seeks to demonstrate evidence at the activity/sub-sector levels identified above. However, due to data limitations, where this is not possible the analysis therefore refers to the hospitality sector as a whole.



1.0 Introduction

1.3 Structure of report

The remainder of this report is structured as follows:

- **Section 2.0** provides an overview of industry trends within the hospitality sector.
- **Section 3.0** presents an overview of the existing labour market across the Solent.
- **Section 4.0** reviews the skills demand position within Solent for jobs within the hospitality sector.
- **Section 5.0** assesses the skills supply position within the Solent taking account of provision within further education ('FE') and higher education ('HE') providers.
- **Section 6.0** considers the challenges and opportunities associated with skills development in the hospitality sector, focusing in particular on the insight generated as part of the Solent-wide engagement with employers in the hospitality sector.

2.0 Industry Trends

The UK hospitality sector has endured a turbulent five years due to the Covid-19 pandemic and Britain's exit from the EU. However, the sector has struggled with a long-running trend of industry-wide labour and skills shortages.

Furthermore, the sector is undergoing a major shift influenced by advances in technology, with potential to disrupt to industry and drive demand for future skills needs.

2.1 The UK hospitality sector

The UK hospitality sector has endured a turbulent five years, owing primarily to the impact of the pandemic, and the restrictions imposed (i.e. various lockdowns and social distancing). Furthermore, Britain's exit from the EU has added to these challenges, particularly by increasing supply chain costs, whilst also creating labour market and local skills gaps.

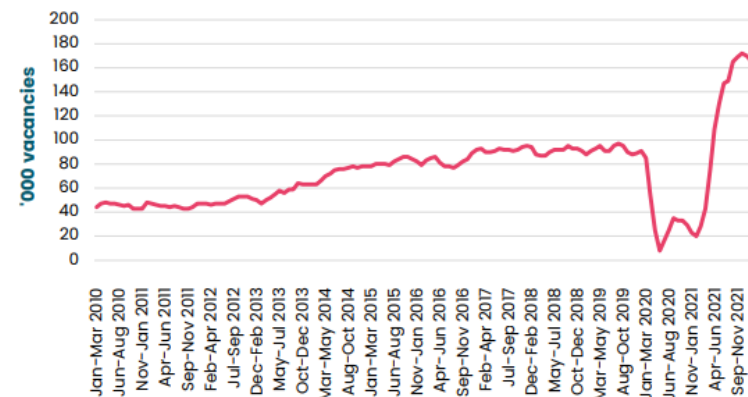
The subsequent cost of living crisis (i.e. in late 2021) has tempered the sector's rebound. The rise in both energy prices and supply chain goods increased operating costs for businesses in the hospitality sector, while inflationary pressures have eroded households' disposable incomes, which has in turn impacted on the demand for hospitality services. The combined effect has been a squeeze on businesses leading to several challenges. These challenges are exacerbated by a long-running trend of industry-wide labour and skills shortages. Whilst people are looking for jobs, a significant number are either unqualified and/or unwilling to fill roles in hospitality. There is both a need to fill jobs in the short-term and increase the size of the labour pool to attract appropriately skilled workers, with these challenges likely to persist over the longer-term.

However, the industry is also going through a major shift influenced by advancements in technology, such as the increased prevalence of contactless service (e.g. mobile check-ins, the use of apps/tablets for ordering). Ultimately, this may alter the skills required for roles within the hospitality sector.

The continued growth of the sharing economy (via platforms such as Airbnb and Uber Eats) has potential to cause further disruption to the industry. In time, this may require the hospitality sector to rethink its offer, and as a consequence, alter the skills needed by its workforce.

Likewise, the cruise industry has enjoyed a period of growth fuelled by a diversified offer and by attracting younger customers. However, the labour market challenges outlined above are likely to be even more acute within the industry due to the challenging work schedules. (For the purposes of this report, hospitality on cruises is incorporated within the definition outlined above, as traditional standard industrial classification ('SIC') codes for the industry – SIC 50100 and SIC 50300 incorporate a wide range of activities in addition to hospitality).

Figure 2.1: Job vacancies in hospitality¹, 2010 -2021



Source: [UKHospitality](#) (2022), *The UK's hospitality workforce strategy: Fixing the crisis*.

3.0 Labour Market Information

Within the Solent, the hospitality sector supports around 53,300 jobs across 3,100 businesses, with particular concentrations of employment in Portsmouth, the New Forest, Southampton and the Isle of Wight.

Nationally, the hospitality sector is estimated to support in the region of 2.3 million jobs, across 156,000 businesses.

3.1 Local trends in hospitality

Within the Solent, the hospitality sector supports around 53,300 jobs, accounting for 10% all jobs within the sub-region. This is slightly higher than the proportion of employment in hospitality seen nationally (8.1%), with the Solent also having a slightly higher level of specialisation defined as a location quotient ('LQ') of 1.2. LQ is a measure of a sector's role within the local economy, where a value greater than 1.0 shows higher levels of specialisation relative to the national average.

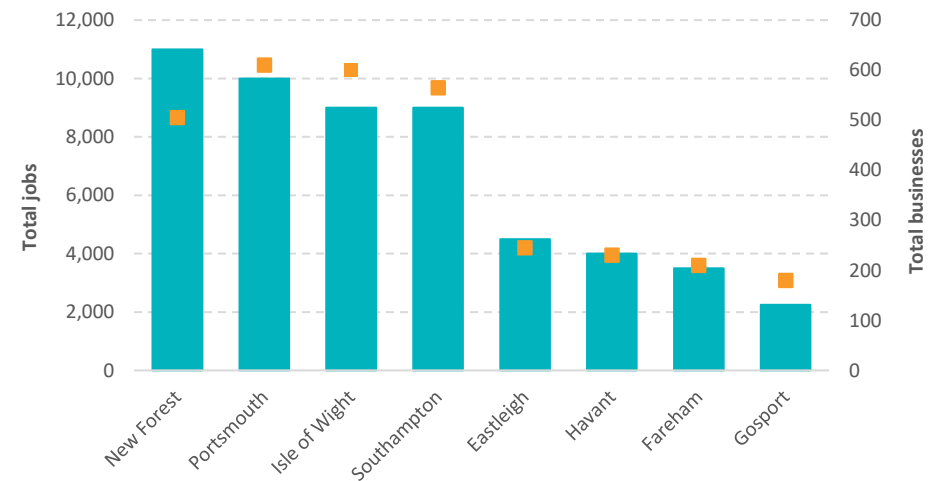
Employment in hospitality across the Solent peaked at around 53,300 job in 2023, having grown considerably (i.e. by +13.3%) from 47,000 jobs in 2015. Having reached 48,500 jobs, employment in hospitality remained relatively unchanged between 2017 and 2019, after which it fell significantly as a consequence of the Covid-19 pandemic. As of 2023, employment figures have since returned to, and exceeded pre-pandemic levels.

The Solent is also home to an estimated 3,100 businesses in the sector. Of these, 75% employ fewer than ten people which is broadly in line with the national trend (of 76.7%). Although the proportion of large businesses in hospitality (i.e. businesses employing 250 people or more) is influenced by the number and proportion of smaller businesses, it is estimated that these account for c. 0.3% of all businesses in hospitality across the Solent.

The New Forest (with 11,000 jobs), Portsmouth (10,000 jobs), the Isle of Wight and Southampton (both 9,000 jobs) represent the key hotspots for employment in the sector across the region. Outside these areas (i.e. within Eastleigh, Havant, Fareham and Gosport), employment levels fall considerably (i.e. accounting for around 14,300 jobs, or around a quarter of all jobs in the sector).

Of the 3,100 hospitality businesses within the Solent, around 610 are located in Portsmouth, followed by the Isle of Wight (600) and Southampton (565).

Figure 3.1: Hospitality jobs and businesses (2023) within the Solent



Source: ONS (2023), Business Register and Employment Survey & ONS (2023) UK Business Counts

3.0 Labour Market Information

Employment in hospitality is dominated by activity in public houses and bars, and the accommodation industry. However, despite the lower levels of employment, take away shops and food stands represent the highest proportion of businesses in the sector across the Solent.

Within the Solent, public houses and bars account for over 1-in-5 jobs (i.e. 20.7%) in the sector. Similarly, the accommodation industry (i.e. comprising hotel and similar short stay accommodation but excluding informal accommodation – such as Airbnb) supports a further 1-in-5 jobs (i.e. 19.3%) in hospitality.

This is followed by a high proportion of jobs in licensed restaurants (18.8%) and unlicensed restaurants and cafés (15.1%). Take-away shops and mobile food stands represent a further 11.3% of total employment in hospitality. Whilst not substantial, employment in catering (e.g. event catering and other food service activities) accounts for 5.2% of total employment, while amusement and recreation activities represent 4.2% of hospitality jobs across the Solent.

When considering business composition across the Solent, it is estimated that just under one quarter (23.8%) of businesses in the sector are take away food shops and food stands, followed by licensed restaurants (17.8%) and public houses and bars (15.6%).

This evidence shows that the hospitality sector is diverse (i.e. in terms of levels of employment supported and business demography). Despite the decline experienced and challenging post-pandemic recovery, the sector remains a key pillar of the Solent's economy, supporting a wide range of services and experiences.

4.0 The Demand for Skills (I)

During 2023, the demand for roles in hospitality reached an estimated 16,800 job postings, representing a threefold increase across the region since 2018. The hospitality sector was greatly impacted by the Covid-19 pandemic and Brexit, however the industry has experienced significant growth in demand for jobs in recent years, generally outperforming pre-pandemic demand.

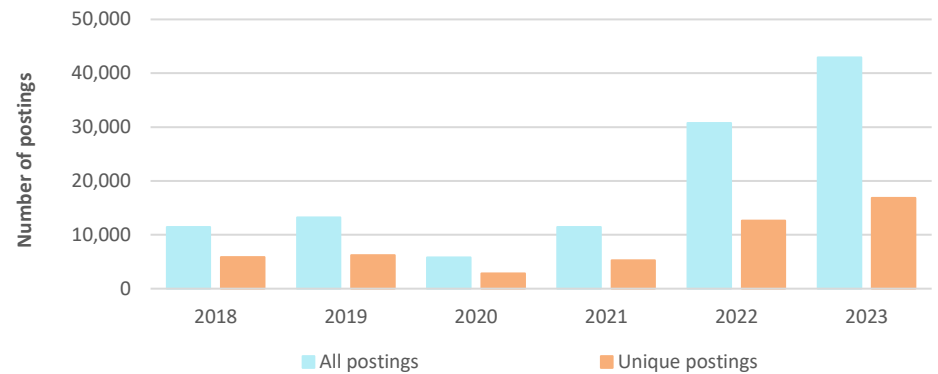
4.1 Changing demand for skills in hospitality

The demand for skills can be measured by considering job postings for roles employers in different sectors are seeking to recruit for. Using a 'best fit' approach for occupations in hospitality (as defined in the introduction section), it is estimated that during 2023 there were around 42,900 total postings for roles the sector, which is equivalent to around 16,800 unique jobs. For the purposes of this deep dive, only the measure of unique jobs postings is considered, as this excludes jobs reposted for previously unfilled roles, and reflects more closely the sector's demand across the Solent.

Analysis of job postings data shows that relative to 2018, the number of unique job postings across the Solent had almost tripled (i.e. +189%) by 2023. As expected, the demand for roles fell to around 2,800 job postings (i.e. around half of the demand in 2018) in 2020 as a direct consequence of the pandemic. After 2020, the increase in job postings was appreciably higher than the overall trend in all (i.e. total unique) job postings in the Solent, where demand increased by an estimated 46% between 2018 and 2023 (i.e. relative to +189% for the hospitality sector). However, it should also be noted that the decline in demand for roles in hospitality during the pandemic was much deeper than that experienced across the wider economy, which makes the increase post-2021 noteworthy.

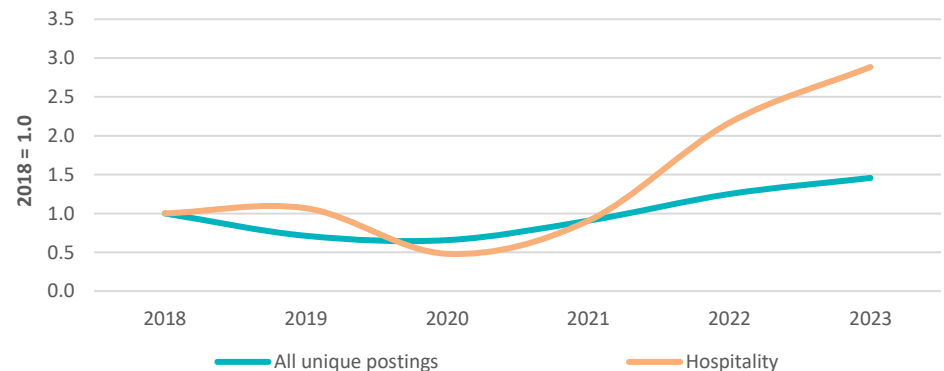
The upswing in job postings from 2021 onwards reflects the winding down of Covid-related measures (i.e. lockdown restrictions), in addition to a greater demand for replacement of labour following the end of the Brexit transition period. However, a proportion of this increase also reflects employment growth in the sector.

Figure 4.1: Number of postings for hospitality jobs in the Solent



Source: Lightcast (2023)

Figure 4.2: The trend in hospitality postings compared to all unique postings



Source: Lightcast (2023)

4.0 The Demand for Skills (II)

Sought-after occupations in hospitality include a mix of lower-skilled roles typically undertaken on a flexible and (often) seasonal basis. However, highly-specialised professions which require a higher level of training also feature prominently. Since 2018, no roles in hospitality experienced any decline, reflecting the high level of labour churn within the industry.

4.2 Sought-after roles and occupations

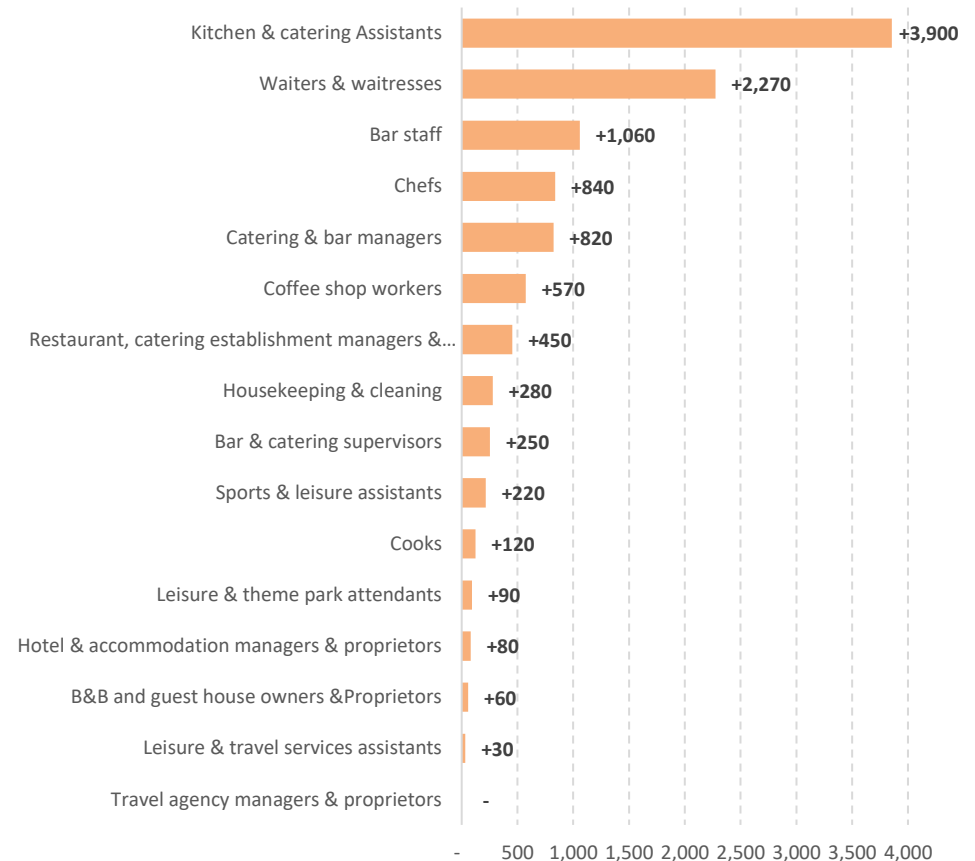
Hospitality incorporates a wide range of activities across different sub-sectors. Drawing on demand data, the top five roles in hospitality most sought after during 2023 include:

- Kitchen & catering assistants, including fast food workers (4,740 job postings);
- Chefs (4,080 job postings);
- Waiters & waitresses (2,700 job postings);
- Bar staff (1,740 job postings);
- Restaurant & catering establishment managers & proprietors (1,040 job postings).

The most frequently sought occupations include a mix of lower-skilled roles typically undertaken on a flexible and (often) seasonal basis. However, more highly specialised professions which require a higher level of training, such as chefs, also feature prominently.

A review of change in the demand for roles in hospitality in the five years to 2023 suggests that no occupations experienced any decline over this period (i.e. excluding the Covid-induced slowing down in 2020). That said, it should be noted that specific occupations relating to entertainment (such as musicians and actors), and leisure and theme park attendants recorded no change in job postings between 2018 and 2023. In general, the change in demand for roles in hospitality reflects Covid-19 and Brexit-induced changes to the labour market, in addition to employment growth in hospitality.

Figure 4.3: Change in job postings for hospitality jobs, 2018 to 2023



Source: Lightcast (2023)

4.0 The Demand for Skills (III)

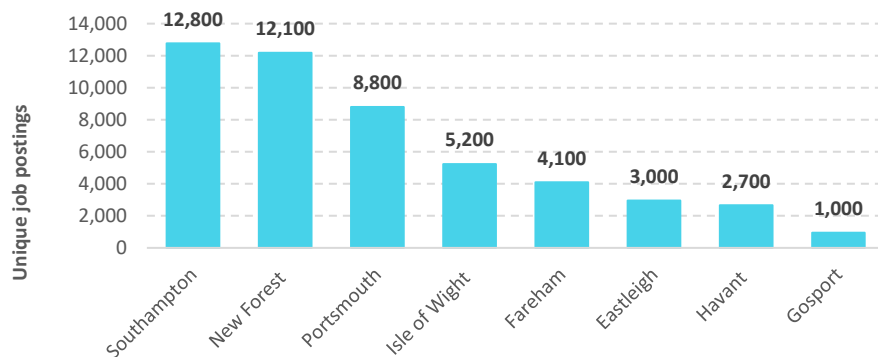
The demand for roles in hospitality is driven, in part by the strong tourism and visitor offer in Portsmouth and Southampton, in addition to key attractions and the natural environment in the New Forest. Since 2018, the Isle of Wight has experienced strong demand for roles in hospitality, reflecting a maturing visitor offer.

4.3 Locational drivers of demand

With over 12,000 (unique) job postings each, Southampton and the New Forest had the highest number of total demand in the sector between 2018 and 2023. Together, the two areas account for over half of all demand across the Solent over this period. With around 8,800 total job postings, Portsmouth had the third-highest level of demand for roles in the sector. In contrast, with around 1,000 job roles advertised, Gosport had the lowest demand for roles in hospitality across the Solent.

The high demand in Southampton and Portsmouth reflects their overall strength as major population centres within the sub-region, whilst the high levels of demand in the New Forest can be associated with the area's natural beauty (i.e. the New Forest National Park) and key local attractions (such as Paulton's Park featuring Peppa Pig World).

Figure 4.4: Unique hospitality job postings by local authority, 2018-2023

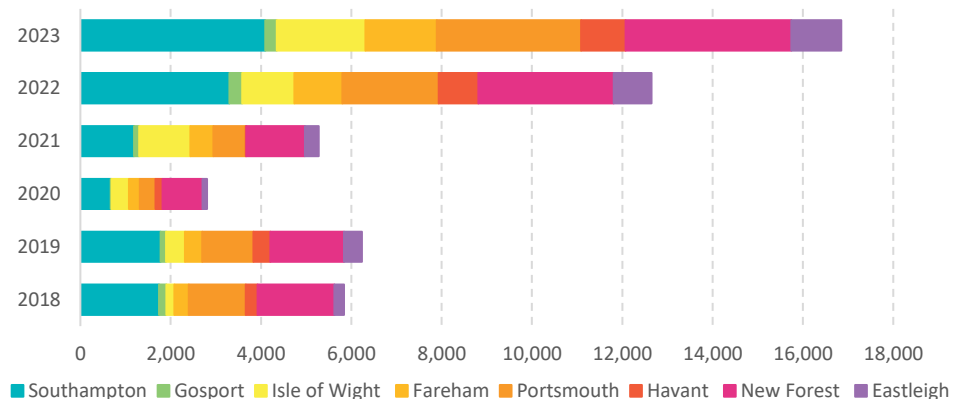


Source: Lightcast (2023)

All eight Solent local authorities have experienced a strong increase in the annual demand for roles in hospitality over this period. Despite not having the largest share of job postings, demand grew 11-fold (i.e. +1,024%) on the Isle of Wight, driven primarily by the need for lower skilled occupations (e.g. catering assistants, housekeepers, bar staff and waiters / waitresses).

Eastleigh, Fareham and Havant all experienced significant growth, owing primarily to some employment growth in the sector. However, the scale (i.e. quantum) of demand within these areas was below that experienced in locations where the hospitality sector (driven in part by a strong visitor economy) is more established.

Figure 4.5: Hospitality job postings by year and local authority within the Solent



Source: Lightcast (2023)

4.0 The Demand for Skills – Employer perspectives

Employer engagement has identified several wide ranging, and sector-specific challenges when seeking to recruit into the hospitality industry. Stakeholders predict that digital skills will become increasingly critical as the industry integrates technology, in addition to a rising need for personal resilience and strong communication skills.

4.4 Employer engagement

In addition to reviewing data on job postings, the analysis presented within this report also draws on a review of engagement with employers and other key stakeholders (e.g. training providers and public sector organisations) with an interest in hospitality. The aim of this engagement was to gather additional insight into some of the challenges employers face when recruiting and seeking to build a skilled workforce.

It should be noted that the following analysis is based on several forms of engagement (e.g. surveys, one-to-one discussions, workshops and online surveys) completed at different points-in-time and run by different organisations with interests in the skills agenda across the Solent. This includes evidence gathered when preparing the Solent LSIP (i.e. in early 2023), in addition to round-table engagement completed towards the end of 2024. Based on this engagement, the key challenges faced by employers when recruiting for roles in the sector include:

- Finding candidates with strong interpersonal skills;
- Being cost competitive in attracting good candidates;
- Finding employees with sufficient levels of English use and understanding;
- Finding seasonal staff;
- Basic food preparation skills;

- Finding staff with specialised skills (e.g. music and entertainment);
- Specialist skills related to hospitality.

4.5 Future demand

Via this engagement, this report has also sought to examine how skills demand in hospitality are likely to evolve over the coming years. In line with the analysis of wider industry trends, employers and stakeholders have identified a growing demand for digital skills, as the sector seeks to adapt to an increasingly digitised world (e.g. self-check in, online ordering, etc). In addition, employers and stakeholders have identified a growing demand for interpersonal and communication skills, as well as basic skills in English and Maths.

Linked to the above, employers have also identified the potential for a growing demand in employees having greater personal resilience. This is particularly important in the hospitality sector, where staff often face high-pressure environments, irregular hours, and the need to manage customer expectations effectively. In this context, personal resilience will enable employees to handle these challenges, manage stress and sustain productivity, ultimately benefitting employers and employees by fostering a more adaptable and reliable workforce.

5.0 The Supply of Skills – Skills providers in the Solent

The Solent region hosts a wide range of further education and higher education institutions, alongside independent training providers, and the South Coast Institute of Technology.

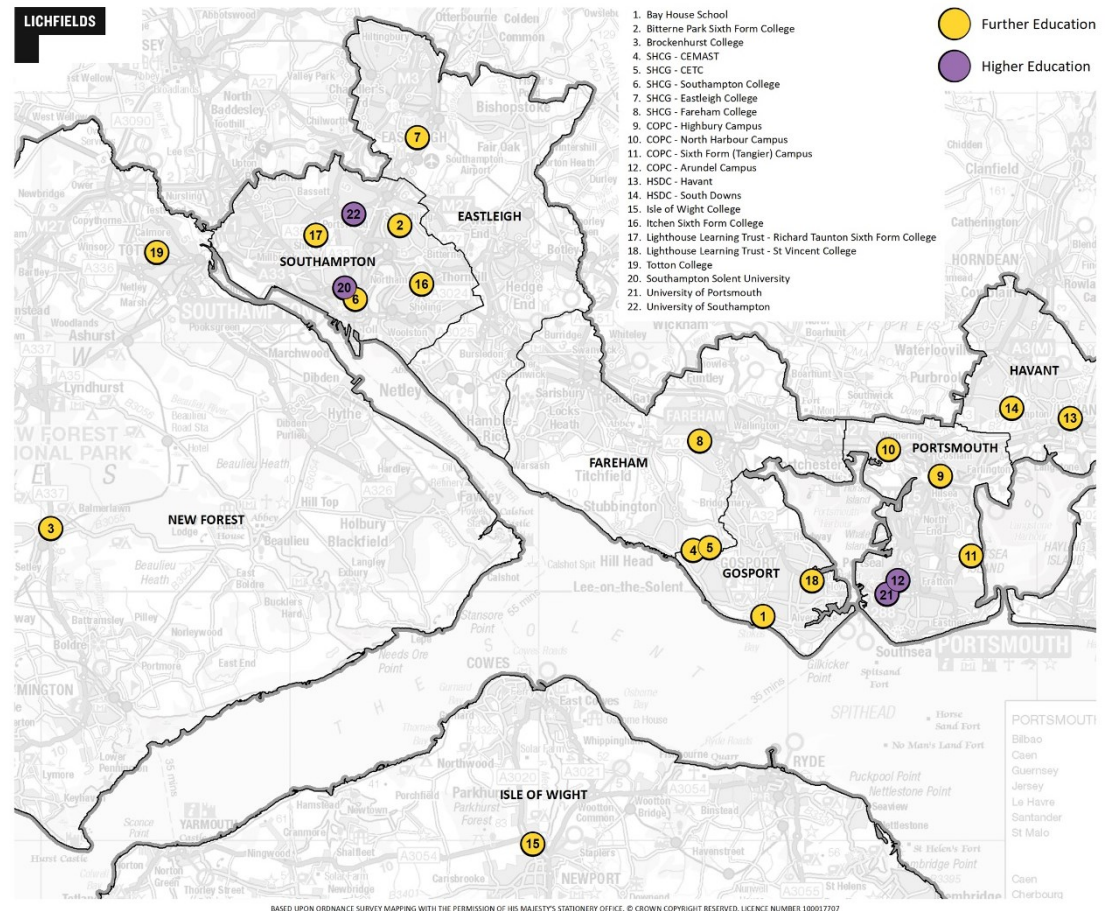
5.1 Skills providers within the Solent

The Solent is home to several higher education (‘HE’) and further education (‘FE’) institutions, in addition to other independent training providers (‘ITP’), offering qualifications, apprenticeships and other vocational training opportunities across a wide range of subject areas related to the hospitality sector.

FE providers offer a wide range of qualifications, including A-Levels, T-Levels, apprenticeships and other vocational/training opportunities aimed at preparing students for careers within the hospitality sector.

The Solent is also home to three HE institutions (i.e. University of Southampton, University of Portsmouth and Southampton Solent University) which together have over 60,000 students registered. Analysis of these providers in shows that as of February 2025 there is no existing provision in the Solent. However, the University of Portsmouth has a new MSc qualification in International Hospitality and Tourism Management which is due to commence in September 2025.

Figure 5.1: Higher and further education providers across the eight Solent local authorities



Source: Lichfields analysis

5.0 The Supply of Skills – Mapping provision in Hospitality (I)

Within the Solent, most of further education provision in hospitality focuses on developing skills for catering and hospitality team member / supervisor roles, with limited provision aimed at developing management-level roles.

5.2 Occupational maps for skills in hospitality

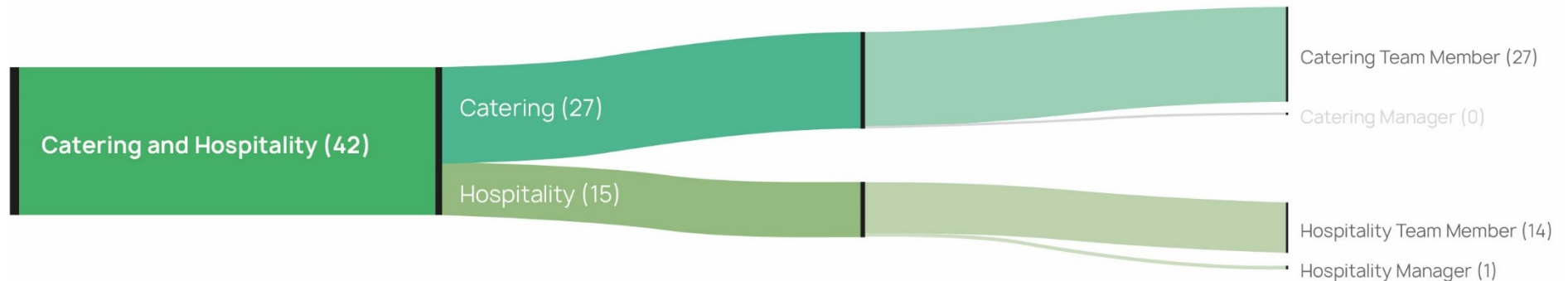
The Institute for Apprenticeships and Technical Education (‘IfATE’) works with employers to shape, and influence skills training in England. An arm’s length body of the DfE, IfATE plays a key role in shaping the skills offer, whilst also ensuring that it reflects employers’ needs for current and future skills needs.

Drawing on [occupational maps](#) for skills in catering and hospitality, Figure 5.2 below identifies the various routes for technical, higher-technical and/or professional occupation qualifications on offer within the Solent. A review of training offered by HE and FE providers in the Solent, has identified a total of 42 technical-level (i.e. ranging from Level 2 and Level 3) qualifications across seven providers as outlined in the following pages.

In general, provision within the Solent is focused almost exclusively on developing skills for team member and/or supervisor roles, with only one FE provider (i.e. Brockenhurst College) offering a higher technical qualification (i.e. Level 4 Hospitality manager apprenticeship). Furthermore, only one HE provider offers professional-level qualifications (i.e. MSc International Hospitality and Tourism Management).

A detailed list of courses provided by the different HE and FE providers within the Solent is included in Appendix 2. This analysis is not exhaustive and has not included ITPs within the Solent.

Figure 5.2: IfATE mapping for provision in hospitality



Source: Lichfields analysis

5.0 The Supply of Skills – Mapping provision in Hospitality (II)

Further education provision in the Solent offers 42 technical-level qualifications, focused almost exclusively on the development of team member and supervisor roles, with only one course aimed towards higher-technical and management-level occupations. Higher education provision is also limited, with the University of Portsmouth set to introduce a new MSc in International Hospitality and Tourism Management in September 2025.

5.3 Further Education provision

As highlighted above, there are 42 technical-level qualifications (i.e. ranging from Level 2 and Level 3) related to hospitality in the Solent. Delivered by six FE providers (i.e. Brockenhurst College, City of Portsmouth College, Havant and South Downs College, the South Hampshire College Group at Southampton College, Eastleigh College, and Fareham College, the Isle of Wight College and Totton College), these courses cover a wide range of study areas, comprising apprenticeships, T-Levels and Diplomas such as:

- Commis chef apprenticeship (Level 2);
- Diploma in professional cookery (Level 2);
- T-Level in catering (Level 3);
- Hospitality team member apprenticeship (Level 2);
- Hospitality supervisor apprenticeship (Level 3);
- Professional catering (Level 2); and
- Food & beverage service (Level 3).

In general, current FE provision for skills in hospitality focuses almost exclusively on technical occupations, including hospitality and/or catering team members and/or supervisors, with only one FE provider (i.e. Brockenhurst College) offering a higher-technical qualification to develop catering and/or hospitality management skills.

5.4 Higher Education provision

Analysis of HE provision in the Solent shows that currently there is no existing provision of courses in hospitality and/or related areas. The University of Portsmouth has a new MSc qualification in International Hospitality and Tourism Management which is due to commence in September 2025.

This 12-month long qualification, will help learners understand the workings of the global tourism and hospitality industries, and will incorporate modules on leadership and management of tourism/hospitality operations, financial and risk management, in addition to global marketing and sustainability. This course combines business and management studies, whilst the skills developed will put candidates in a position to help shape the practices required to grow a sustainable tourism and hospitality industry.

5.0 The Supply of Skills – Learners in the Solent

In 2023/24, the Solent had approximately 1,100 learners aged 16-19 in addition to a further 200 learners aged 19+ studying hospitality-related courses, with most enrolled in Level 1 and Level 2 qualifications. Additionally, 600 apprenticeships in hospitality and catering were recorded during the same academic year.

5.5 Further Education learners (16-19 and 19+)

Analysis of Individual Learner Record ('ILR') data shows that in the 2023/24 academic year there were 69,500 learners aged 16-19, in addition to a further 17,200 learners aged 19 and over in the Solent.

Using a best-fit definition for the hospitality sector (which in the case of the ILR incorporates both courses related to hospitality and leisure, in addition to leisure, travel and tourism), it is estimated that in aggregate there are around 1,100 learners aged 16-19, in addition to a further 200 learners aged 19 and over. Broadly speaking, this represents c. 1.5% of all learners in the Solent, the majority of whom (estimated to be around 750) are registered in courses specially related to the ILR's definition of hospitality and leisure.

Analysis of enrollment data shows that nearly half of learners aged 16-19 (i.e. 47%) are pursuing Level 1 courses, highlighting a significant focus on foundational qualifications. Additionally, 38% of learners in this age group are enrolled in Level 2 courses, showcasing their progression towards more advanced study. Finally, it is estimated that only around 15% of learners are enrolled in Level 3 courses.

Information on course completions and retention rates outcomes are not available for subject areas, nor are these available for the Solent LSIP geography. However, Hampshire-wide evidence suggests that the area has an overall achievement rate of 84%, with a pass rate of 85.1% pass rate, which is a decline from the previous year (i.e. of 96.8% in both instances).

When considering adult (i.e. 19+) learners, the ILR data does not highlight any hospitality-specific outcomes, although it does identify wide ranging qualifications (such as Diploma in leadership and management) which might be indirectly appropriate to the hospitality sector.

5.6 Apprenticeships

In total, ILR data shows that during 2023/24, there were over 16,300 people enrolled in apprenticeships across the Solent area. Of these, around 600 apprenticeships are in hospitality and catering subjects.

Drawing on qualification levels, ILR data shows that just over half (i.e. 54%) are at intermediate level, with a further third (i.e. 34%) being at advanced level. The rest (i.e. 11%) are higher-level apprenticeships.

The areas in which apprentices in hospitality are enrolled in are wide ranging, and include:

- Hospitality supervisor (with 150 apprentices);
- Commis chef (with 110 apprentices);
- Hospitality team member (with 110 apprentices);
- Production chef (with 100 apprentices);
- Hospitality manager (with 70 apprentices);
- Others (e.g. senior chef production cooking, chef de partie, baker, and senior culinary chef).

5.0 The Supply of Skills – Employer perspectives

Engagement with employers in hospitality has identified challenges in interacting with skills training due to costs, time constraints and accessibility, prompting calls for a wider offer of modular-based online courses. Stakeholders highlighted gaps in management-level qualifications, emphasising the need for better sector promotion, recruitment strategies and work experience initiatives aimed at building a skilled future workforce.

Our engagement with employers and stakeholders with interest in hospitality provided an opportunity to investigate the skills challenges and trends influencing the supply of skills within the sector across the Solent.

5.7 Employer engagement

Employers' approaches to skills development in the sector vary greatly, and include apprenticeships, paid-for commercial training, funded courses, free and/or low-cost training, in addition to peer-to-peer learning and job shadowing. Most of the employers engaged reported an annual skills spend of up to £1,000 per member of staff.

However, employers cited costs, time commitments and staffing constraints, in addition to accessibility of provision as the key barriers to engaging with full-time and/or part-time skills training initiatives.

To address these barriers, employers in hospitality have identified several potential approaches which could be adopted, such as greater engagement with employers, adapting the current offer to include short and modular courses, in addition to low-cost and online training. However, employers have also highlighted the need for improved links between industry and wider skills ecosystem (especially local FE provision) and improving the funding offer to enable greater uptake of continued professional development ('CPD').

5.8 Tackling skills gap and ensuring a talented future pipeline

Engagement with stakeholders has also identified a series of skills gaps and challenges, in particular related to management-level positions. This reflects gaps in courses at this level, identified previously when considering the FE provision across the Solent. That being said, employers highlighted that in addition to the above, the sector struggles with a wide range of skills gaps which incorporate both front-of-house and less visible positions.

In general, stakeholders agreed that the sector should be better at promoting itself, and the opportunities it offers (e.g. opportunities for progressions, workplace flexibility, etc.). Furthermore, stakeholders acknowledged that the sector also needs to improve its approach to recruitment (in particular to understand the younger generation's needs).

Finally, employers have also identified a number of general skills gaps across the wider economy (such as communication, teamwork, project management, sales and business development) which also need to be addressed. They acknowledged that engagement through work experience (i.e. through T-Levels and apprenticeships) has a key role to play in both addressing these skills gaps, whilst also building a skilled future workforce.

6.0 Challenges and priorities for change

The hospitality sector has rebounded strongly since the pandemic, with employment levels fully recovering by 2023, and projected to grow by c. 6,000 jobs over the next 15-years. However, challenges such as labour shortages post-Brexit, misperceptions, a transient workforce and gaps in management-level skills may constrain the sector's future potential.

6.1 Scale of opportunity in hospitality

As highlighted previously, the hospitality industry across the UK has faced unprecedented challenges during the Covid-19 pandemic, with travel restrictions, lockdowns and social distancing measures causing a dramatic decline in tourism (i.e. both internal and international), hotel occupancy and restaurant levels. Employers in the sector grappled with closures, labour shortages and heightened uncertainty, exacerbated by the UK's exit from the EU (and subsequent end of the transition period).

However, the sector has demonstrated strong recovery since 2020 with evidence suggesting that by 2023 employment in hospitality had recovered to pre-pandemic levels. Whilst this recovery signals a renewed optimism for the future of the industry, evidence suggests that during 2024 hospitality experienced only [+1% growth](#) year-on-year (i.e. relative to 2023), which is considerably lower than the 'base scenario' (i.e. of +1.9% CAGR) identified by UK Hospitality in a June 2023 study. However, [research](#) suggests that demand in 2025 will be positive, driven in part by resilience in travel, especially from the US, Europe and Asia more widely.

Taking a longer-term view, employment forecasts (from Experian) suggest that employment in the accommodation and food services sector (i.e. used as a high-level proxy for the hospitality sector) within the Solent will increase by around 6,000 jobs (i.e. +13.2%, or the equivalent of +0.8% per annum) over the next 15 years. This growth will generate significant opportunities for the sector across the Solent, fostering economic success and enabling businesses to capitalise on increasing demand. However, it is equally important for hospitality to recognise the challenges that may constrain this potential.

6.2 Skills gaps and challenges

Drawing on the analysis and employer engagement presented in this report, it is anticipated that employers in hospitality across the Solent could face a number of challenges which may impact their ability to balance the demand for skills with growth ambitions.

- **Size and availability of the labour market** – whilst this challenge is not unique to hospitality, the sector has been greatly impacted by the end of freedom of movement. Analysis of demand data suggests that growth in the number of jobs postings has been driven (at least in part) by the demand for replacement of labour following the end of the Brexit transition period.
- **Perceptions of the hospitality sector** – engagement with employers suggests that the sector struggles with misperceptions that do not reflect the level of opportunity and growth employment in the sector can offer to its workforce.
- **A transient labour force** – linked to the above, the sector is characterised by having a transient labour force which is influenced greatly by the seasonal nature of the visitor economy in some locations across the Solent.
- **The shift to digital** – whilst the scope for automation and digitalisation in hospitality is somewhat limited, changes introduced during/following the pandemic (initially out of necessity), such as the implementation of contactless technology and self-service, may alter the skills profile required for employment in the hospitality sector.

6.0 Challenges and priorities for change – Recommendations

Drawing on the analysis undertaken, and engagement with employers in hospitality and other relevant stakeholders, this deep dive outlines several priorities for change the Solent LSIP and delivery partners can implement to better balance the demand and supply of skills needed to support a thriving hospitality sector in the Solent, now and in the future.

- **Gaps in supply provision** – a mapping exercise for FE provision in the Solent in addition to employer engagement have identified a gap in skills related to management-level positions which may, in turn impact upon the overall perception of the sector .

6.3 Recommendations for change

A series of actions and recommendations are set out below that partners from across the Solent can implement to address the challenges identified and build a future workforce with the skills needed to support a thriving hospitality sector in the Solent, now and in the future.

Recommendation	Challenges this addresses
Work with employers and other relevant partners to broaden the sector’s potential labour market, by seeking to change perceptions (e.g. about opportunities for progression and growth, entry points, flexibility, etc.), and engaging harder to reach groups (e.g. economically inactive residents who would like to pursue employment opportunities).	<ul style="list-style-type: none"> • Enable growth of +0.8% per annum (or the equivalent of c. 6,000 jobs) over the next 15-years. • Widen the potential labour market pool to include unemployed residents who are looking for work, in addition to economically inactive residents (i.e. in line with the priorities outlined in the Get Britain Working White Paper).
Increase engagement between employers and FE providers to help change perceptions through greater collaboration (e.g. via subsequent Local Skills Improvement Fund, or ‘LSIF’ delivery).	<ul style="list-style-type: none"> • Address misperceptions about employment in hospitality, and the benefits this offers over both the short- and long-term. • Increase direct engagement between employers and (potential) future pipeline of workers (i.e. via work experience, T-Levels and Apprenticeships in hospitality and catering).
Linked to the above, work with partners across the sector to increase the provision of higher-level training (i.e. for management-level occupations) in the sector	<ul style="list-style-type: none"> • Address identified gaps in FE skills provision. • Continue raising awareness of opportunities in the sector.
Work with partners to implement changes that help with long(er)-term employee retention through an improved skills offer (e.g. via delivery of modular training, greater funding flexibility, and pre-apprenticeship training).	<ul style="list-style-type: none"> • Help build a more permanent (i.e. less transient) and resilient workforce in the sector, to attract and retain life-long employees.
Linked to the recommendation to help change the sector’s perceptions, work with employers to identify opportunities for, and implement greater flexible working practices.	<ul style="list-style-type: none"> • Widen the potential labour market pool for employment in hospitality. • Help challenge misperceptions about employment in hospitality.

Appendix 1 – Detailed SIC code definition of hospitality

Activity	Sub-sector	SIC code
Hotel and related	Hotels and similar accommodation	5510
	Holiday and other short stay accommodation	5520
	Camping grounds, recreational vehicle parks and trailer parks	5530
	Other accommodation	3390
Restaurant and related activity	Licensed restaurants	56101
	Unlicensed restaurants and cafés	56102
	Take away food shops and mobile food stands	56103
	Licensed clubs	56301
	Public houses and bars	56302
Catering	Event catering and activities	5621
	Other food services activities	5621
Event management	Convention and trade show organisations	5629
Cultural and recreational activities	Amusement and recreation activities	8230

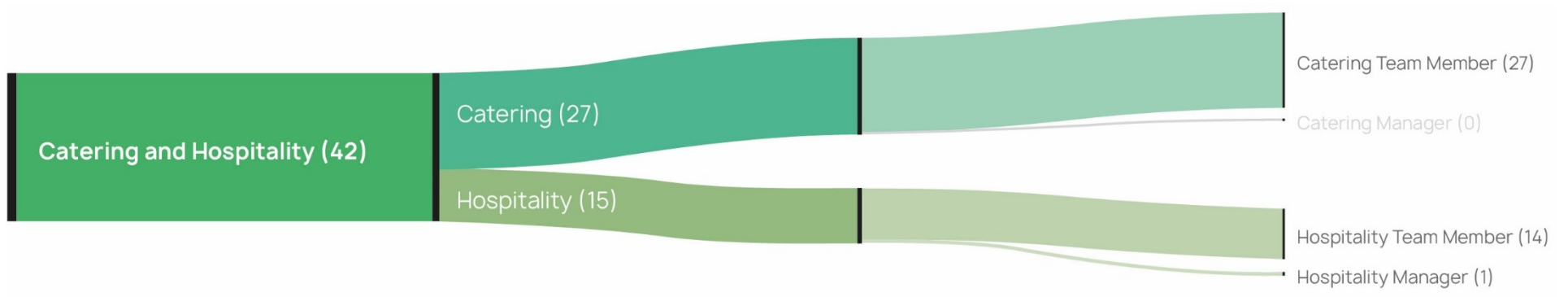
Appendix 2 – FE provision mapped vs IfATE occupation maps (I)

Sector	Sub-sector	Level	Course	Provider
Catering	Catering	Technical occupations	Level 2 Commis Chef Apprenticeship	SHCG - Southampton College
		Technical occupations	Level 2 Diploma in Professional Cookery	SHCG - Southampton College
		Technical occupations	Level 2 Production Chef Apprenticeship	SHCG - Southampton College
		Technical occupations	Level 2 Production Chef Apprenticeship	SHCG - Fareham College
		Technical occupations	Level 2 Production Chef Apprenticeship	SHCG - Eastleigh College
		Technical occupations	Level 2 Professional Catering	SHCG - Southampton College
		Technical occupations	Level 2 Professional Catering	SHCG - Fareham College
		Technical occupations	Level 2 Professional Catering	SHCG - Eastleigh College
		Technical occupations	Level 3 Professional Catering	SHCG - Southampton College
		Technical occupations	Level 3 Professional Catering	SHCG - Fareham College
		Technical occupations	Level 3 Professional Catering	SHCG - Eastleigh College
		Technical occupations	Level 3 T Level Catering	SHCG - Southampton College
		Technical occupations	Level 3 T Level Catering	SHCG - Fareham College
		Technical occupations	Level 3 T Level Catering	SHCG - Eastleigh College
		Technical occupations	Level 2 Professional Cookery	City of Portsmouth College
		Technical occupations	Level 3 Advanced Professional Cookery	City of Portsmouth College
		Technical occupations	Level 2 Commis Chef Apprenticeship	City of Portsmouth College
		Technical occupations	Level 2 Production Chef Apprenticeship	City of Portsmouth College
		Technical occupations	Level 3 Chef de Partie Apprenticeship	Havant and South Downs College
		Technical occupations	Level 2 Commis Chef Apprenticeship	Havant and South Downs College
		Technical occupations	Level 2 Professional Cookery	Havant and South Downs College
		Technical occupations	Catering - Professional Cookery Level 3	Isle of Wight College
		Technical occupations	Hospitality Commis Chef Apprenticeship Level 2	Isle of Wight College
		Technical occupations	Hospitality Chef De Partie Apprenticeship Level 3	Isle of Wight College
		Technical occupations	Chef De Partie Apprenticeship Level 3	Brockenhurst College
	Technical occupations	Commis Chef Apprenticeship Level 2	Brockenhurst College	
Technical occupations	Senior Chef Production Cooking Apprenticeship Level 3	Brockenhurst College		
Hospitality	Catering Manager	Higher technical occupations	n/a	n/a
	Hospitality manager	Higher technical occupations	n/a	n/a
		Higher technical occupations	Hospitality Manager Apprenticeship Level 4	Brockenhurst College
	Hospitality team member or supervisor	Technical occupations	Level 2 Hospitality Team Member Apprenticeship	SHCG - Southampton College
		Technical occupations	Level 2 Hospitality Team Member Apprenticeship	SHCG - Fareham College
		Technical occupations	Level 2 Hospitality Team Member Apprenticeship	SHCG - Eastleigh College
		Technical occupations	Level 3 Food & Beverage Service	SHCG - Fareham College
Technical occupations	Level 3 Hospitality Supervisor Apprenticeship	SHCG - Southampton College		

Appendix 2 – FE provision mapped vs IfATE occupation maps (II)

Sector	Sub-sector	Level	Course	Provider
Hospitality	Hospitality team member or supervisor	Technical occupations	Level 3 Hospitality Supervisor Apprenticeship	SHCG - Fareham College
		Technical occupations	Level 3 Hospitality Supervisor Apprenticeship	SHCG - Eastleigh College
		Technical occupations	Level 3 Hospitality Supervision & Leadership	Havant and South Downs College
		Technical occupations	Level 2 Hospitality Team Member Apprenticeship	Havant and South Downs College
		Technical occupations	Hospitality Supervision And Leadership Level 3	Isle of Wight College
		Technical occupations	Hospitality Supervisor Apprenticeship Level 3	Isle of Wight College
		Technical occupations	Hospitality Services Level 2	Isle of Wight College
		Technical occupations	Hospitality and Catering Futures Entry Level 3	Totton College
		Technical occupations	Hospitality Supervisor Apprenticeship Level 3	Brockenhurst College

Appendix 2 – FE provision mapped vs IfATE occupation maps (III)



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