



## **RESPONS**

### **Responsible Skills Alliance for Sustainable Management of Small Hotels and Restaurants**

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**National Field Research Report**

**Country: France**

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*Greta Marseille sud*

## **Chapter 1: The survey base and sample**

### **1. Information on the particularities of the country**

The sector of hotels and catering services employs one million people, 800 000 of whom are paid employees, that is to say more than four times the people in the automobile industry and more than one and a half time than that of agriculture and agri-food industries.

- **The restaurants**

With a turnover of more than 50 billion euros, the catering services, under all their forms, represent 45% of the income of the French tourism sector.

It's a major sector of the French economy, which characterizes itself by its huge diversity.

1. Diversity by its size:

The distribution by size shows the predominance of establishments of less than 10 employees which constitute nearly nine out of ten enterprises. They employ 4 employees on average per establishment.

2. Diversity of sectors: Commercial catering, mass catering, fast foods,

3. Diversity of enterprises.

4. An evolution of sharp/marked consumption

An evolution that is both qualitative and quantitative: a French person takes his/her meals more and more outside his/her home, the consumer modifies progressively his/her habits. He/she wishes more and more to “eat better, cleverly and responsibly”.

Under the influence of public policies of prevention, the consumers are in the quest of more and more balanced meals and better quality products.

However, this evolution of consumption is associated with the willingness to maintain an attractive value for money.

5. A big number of specificities : drudgery of work, mobility, seasonality, a distribution of assigned jobs, a high turnover.

The meals served at the table represent only 17% of served meals. Simplified and fast services are better adapted to the current mode of life. Nowadays, the traditional meal is in part replaced by the consumption of meals distributed by fast food outlets, and also by alternative food trades (bakeries, deli meats) that deliver a parallel catering service. It explains the decline of activity of independent catering services at the benefit more simplified services. By 2020, the tourism industry should encounter a dynamic growth due to a new demand coming from emerging countries and due to the aging of the population of developed countries.

New needs of consumption should thus accompany this progress.

The demand for novelty emanates also from the urban and well-off clientele who are in the search of new spaces of conviviality and new eating experiences.

• **The hotels**

France is the main tourist destination in the world. The country has a hospitality sector composed of 19000 establishments of 655 000 rooms.

A very diversified sector of activity, type of hotel wise as well as territorial coverage wise.

The differentiation is made through:

- the localization (city centre, urban outskirts, rural zone...)
- the nature of services (ex : with or without catering services...)
- the period of opening (seasonal or open all year)
- belonging to or not to a hotel chain or group.

Ranking January 2011	Independent hotels		Chain hotels	
	Number of hotels	Number of rooms	Number of hotels	Number of rooms
0/1 *	2909	44285	1125	79133
2*	8715	198043	1297	86515
3*	3214	107207	869	73072
4* and more	644	24874	275	40981
<b>Total</b>	<b>15482</b>	<b>374409</b>	<b>3586</b>	<b>279701</b>

Source HTR - MKG HOSPITALITY February 2011

The business clientele generally stay for a short period. They represent a relatively stable part of the activity of independent hotels and an important part of that of the chain hotels, correlated with general economic activity. During these last years, the enterprises have lent an increased attention to budgets used for this activity which is reflected in a reduction of the duration of stay and services.

Nowadays, the individual clientele favor short stays and weekends. The choices are often made at the last moment and the development of customer loyalty for this group remain unfulfilled. The foreign or local competition (ex: holiday cottages) is more and more present on this segment of activity.

The clientele is currently located in a market that is expanding geographically, which leads to a great sensitivity to climatic, meteorological, economic and political phenomena. All these influences can prove to be favorable or unfavorable to the demand of hotel business in France. It's the subject of abrupt shifts that are hard to predict.

Independent hotels are deeply affected by these modes of consumption.

The hotel classification has been reformed in December 2009. It is voluntary for the establishments and defines numerous and new criteria and a new procedure for the tourist hotels. The criteria rely on the facilities of the establishment, the services provided to clients, accessibility and sustainable development. The previous classification was taken off in July 2012.

## **2. Information on the companies involved.**

The survey focused on a sample of 20 establishments located in the Bouches du Rhône region and its adjacent departments. It has been carried out on a panel of 10 hotels and 10 restaurants.

- **The restaurants**

<b>Types of restaurants</b>					
<b>Restaurants</b>	<b>Organisation</b>	<b>Staff</b>	<b>Family owned</b>	<b>Location</b>	<b>Comments</b>
Question de goût	Refined, modern and creative cuisine	0 to 5	No	By the sea but In a big city	Offers the possibility of taking cuisine lessons
Auberge de Pichauris	Banquets Family parties Parties	0 to 5	Yes	1600 hectares estate on a hill	Offers the possibility of renting a reception room in Allauch
La table des Garrigues	Traditional and regional cuisine	5 to 9	Yes	Big city	Hotel and restaurant in Marseille
Les Bougainvilliers	Gourmet Fish speciality	5 to 9	No	Sea view Very touristic place	2 restaurants in Théoules-sur-mer
Jean David Traiteur	Caterer Specialised in Reception organisation	10 to 20	Yes	Small town Next to Marseille	Also restaurant owner in Allauch
Les 3 Frères	Brasserie Provencal and Mediterranean cuisine	21 to 50	Yes	Big city	2 restaurants in Marseille
Table au Sud	Gourmet Fish speciality	10 to 20	No	City centre of a big city next to the harbour	“Top chef” participant : high media centred. Marseille
Le grand Puech	Traditional Cuisine Banquets Seminars	0 to 5	No	Countryside Very typical village	Hotel and Restaurant in Mimet

Café de la banque	Authentic bar brasserie	10 to 20	Yes	City centre of a big city	Authentic period style Brasserie. Marseille
Bistrot du cours	Brasserie	5 to 9	No	City centre of a big city	Very visited place with theaters, cinemas, café-théâtres Marseille

- **The hotels**

Types of hotels				
The hotels	Organisation	Staff	Family owned	Location Comments
Helios	Rooms and flat renting + restaurant 3*	21 to 50	No	Charming hotel situated on L'île des Embiez (island) in the Var Department Offers the possibility of taking cuisine lessons
Côté Sud	Hotel and Apartment hotel Furnished flats 3*	5 to 9	No	Typicalprovençal Village. Allauch
Attrap rêves	Unusual concept : the rooms are transparent bubbles	0 to 5	Yes	Located in the Countryside In an area of 1500 m <sup>2</sup>
Hôtel Hermes	29 rooms in the heart of the city of Marseille 2**	5 to 9	Yes	Located on the harbour With sea view. Very touristic site.
La lauzetane	Hotel and Restaurant Seminars Weddings 2*	5 to 9	Yes	In the mountains
HôtelPéron	Charming hotel with a unique Panoramic sea view on the islands 2*	0 to 5	Yes	Big city. Marseille Built in the 30'. Same family for 4 generations.
Grand hôtel Des Lecques	Hotel and restaurants 3*	10 to 20	Yes	Authentic dwelling "Belle Époque" situated in a 3 hectare park 100 meter from the beach
Le Corbusier	Hotel and Restaurant in a building listed historical	10 to 20	Yes	Historical site in Marseille

	monument 2*			
HôtelSouléia	72 rooms No restaurant 3*	10 to 20	No	At the heart of a small town in Provence.
La Crémaillère	Hotel and Restaurant 2*	5 to 9	Yes	An eighteenth century typical country house next to a seaside resort : Cassis

More than half of the hotels and restaurants have less than 10 employees and 70% are family businesses.

First commentary: the establishments mentioned above are in the national average.

### **3. Means used to contact the establishments and to hold the interviews.**

The establishments have been selected from the large data bank of the work placement department in our hotel and catering school (Marseille). All the students of this school have to carry out, each year, one or two work placements. This positive and profitable school and work experience alternating enabled us to develop a special and trustful relationship between the school and the numerous hotel and restaurant owners.

In addition, an inquiry on the “RESPONS” project as well as a call for applications aimed at the hotels or restaurants that may wish to participate to this survey has been posted on the web site of all the GRETA Centres ([www.gretanet.com](http://www.gretanet.com))

The chosen establishments have been selected in reference to the criteria and objectives recorded in the survey and in the “RESPONS” project too, that is to say: size, company autonomy, level of services offered...

The meeting requests have been carried out by telephone to prevent any cancellation or adjournment that can be frequent in this business. Some owners expressed a need to get to know the questionnaire by mail beforehand to be able to answer it by phone. A large majority of the interviews were held on the premises.

## **Chapter 2 : Dimensions affecting the HORECA SMEs’ performances**

Review of the responses concerning the criteria “importance” in the section “services, problems and gaps in terms of knowledge”.

The chart below shows the sorting of the services and professional responsibilities carried out by the selected owners, it is arranged in importance order (from 1 to 12, from the most important to the least important)

<b>Options</b>	<b>Hotels</b>	<b>Restaurants</b>
WEB 2.0	3	3
Online services	1	10
Individualised hospitality experiences/Menus	8	9
Sustainable resorts and menus	10	2
Wellness based offer	12	11
Healty friendly food and experiences	11	12
Human resources development	7	4
Safe working conditions	5	5
Equal Working conditions	2	7
Responsible workplace	9	8
Ecological Workplace	4	5
Local community and Social initiatives	6	1

A significant reversal of the hierarchy between hotels and restaurants is to identify:

- online services, identified as critical in the hospitality industry and ranked tenth by catering professionals;
- Sustainable resorts and menus very positively weighted by restaurants managers and much less valued by hotels managers.
- This inversion persists, less significant, however, when it comes to value Equal Working conditions, as hoteliers consider essential.

- **The restaurants**

In the chapter “ Major and new trends” our restaurant owners classified the items as following:

- 1) “Local community and Social initiatives”. With more than 8 out of 10 answers ticked as “Very important” and 2 answers as “Important”
- 2) “Sustainable resorts and menus”
- 3) “WEB 2.0”. With 9 out of 10 favourable opinions



- 4) Then they attach much importance to “Equal Working conditions” and “Human resources development”

On the other hand, they don't seem to care much about “Wellness based offer” and “Healty friendly food and experiences”.

- **The hotels**

Concerning the new trends they have to classify, most of the hotel owners have decided on:

1. “Online services”. Chosen by all of them.
2. “Equal Working conditions”. Chosen by all of them.
3. “WEB 2.0”.
4. “Ecological Workplace”

Their very last choice being “Services based on well-being and health”.

**As a conclusion:**

Similarities:

- Interest for the WEB.2.0
- Little interest for “Wellness based offer”.

Obvious differences:

- Online services (1<sup>st</sup> choice for the hotels and 9<sup>th</sup> for the restaurants)
- Sustainable resorts and menus(2<sup>nd</sup> choice for the restaurants and 10<sup>th</sup> for the hotels)
- Local community and Social initiatives (1<sup>st</sup> choice for the restaurants and 6<sup>th</sup> for the hotels)

## **Chapter 3: Dimensions requiring further information/ training**

### **Self-assessment of training needs . Items requiring an extra training**

- **The restaurants**

Concerning the services they qualify as “Important” most of the hotel and restaurants owners label their business competent and even expert.

Concerning the services they don’t offer (*Services based on well-being and health*) and are little concerned by, more than half of them feel unskilled or beginners. Only those two services clearly highlight an admitted failure.

To confirm this trend we have drawn up a double-entry table with the 4 fields of competence involved

Company Expérience	Rank of importance	expert	compétent	Beginner	Inexperienced
Local community and Social initiatives	1	4	6	0	0
Sustainable resorts and menus	2	4	6	0	0
Wellness based offer	12	0	1	5	4
Healty friendly food and experiences	11	0	1	5	4

On the whole we can notice that in the table concerning the assessment of the experience in terms of new trends, the criteria “Competent” scores single-handedly 50% of all the choices, that is 60 ticks out of 120 in all and 21 ticks for the criteria “Expert”.

If we go further and add the criteria “Expert” + the criteria “Competent” we get 2/3 of the choices, that is 81 ticks out of 120.

Those data highlight 3 groups of results :

- The most important themes are well or very well mastered
- The intermediary themes are well or very well mastered too
- The themes that have been qualified as “secondary” are hardly or poorly mastered

- **The hotels**

At first sight, it seems that both restaurant and hotel managers think that, concerning the services they qualify as important, their knowledge is expert and even competent.



And concerning the two services they are not interested in, more than 80% think their business is unskilled or beginner.

On the other hand, if we consider the results dealing with the assessment of the experience in terms of new trends as a whole, we can notice this time that the criteria “Competent” gets, single-handedly, more than 50% of all the choices, that is 61 ticks out of 120 and 8 ticks for the criteria “Expert”. (60 and 21 for the restaurants mentioned above)

Therefore, there are necessarily a little more criteria “beginner” (+4) and much more criteria “inexperienced” (+8).

By looking closer at the board, we notice that this difference concerns two domains in skill :

- a- *“the conditions of hosting” (adapted cultural program... full tourist offers)* and
- b- *“the activities linked to sustainability”*.

We have reproduced this part within the board :

Experience	Expert	Competent	Beginner	Inexperienced
Individualised hospitality experiences		4	3	3
Sustainable resorts and menus		4	2	4
Importance	Very important	important	Quite important	Not importance
Individualised hospitality experiences	1	7	1	1
Sustainable resorts and menus	1	4	4	1

Regarding the interest of professionals and the relative weakness of their skills in these areas, a priority field training here seems to be emerging.

Which helps us conclude that hotels do not involve themselves or few in the domain of *“offers based on the well being and the facilities based on health”*.



## **Chapter 4 : Innovative skills owned by HORECA managers**

### **Skills that are the most or the least spread :**

- **The restaurants**

In the self-assessment of their own skills, it is in :

- the “*Cooperative ability /team spirit*” (9/10) that we find most signs of expertise, just before
- the “*adaptation to the new business enviroment*” (7/10) and
- the “*Innovativeness*” (6/10)

That restaurant owners judge themselves the most skilled.

Globally, restaurant owners had already, at the time of the interview, judged these skills as necessary ones to run a company. This is this feeling that is confirmed since 77 times on 80, they select “expert” (more than 50% of the crosses) or “skilled”.

So, they do not really feel the need on being trained for these skills that they judge necessary and that they implement on a daily basis.

- **The hotels**

The skills that are declared by these managers seen to focus themselves on :

- the “*Cooperative ability /team spirit*” : 100% on the first two criteria
- the “*Innovativeness*”.

91% of the answers, indeed, divide up between “Expert 31%” and “skilled 60%”.

If the choices that go on these two criteria (73 crosses on 80) are unquestionably numerous, the declaration of expertise remain a minority, breaking with the answers communicated by restaurant owners.

Hotelkeepers might need some more strengthening than basic training, strictly speaking, concerning these innovative skills.



## **Chapter 5 :Learning and training**

- **The restaurants**

The choice of several answers which is offered to the focus group, having no instructions to indicate an order of importance, has forced us to only observe the recurrence of positioning.

The communicated obstacles in training are the following ones :

a- *“Available time for training programs”*

b- *“Fit of the available training programs to the organizational needs”*

and the required trainings :

c- *“practical training “*

*“Online based trainings”* and *“Tutorial based training”* are the least required.

- **The hotels**

*“Available time for training programs”* widely represents an obstacle in training. Managers also feel they are *little or badly informed about the existing programs*.

They would rather be interested in practical training courses within a company first, and if not, in a vocational training center.



## **Chapter 6 : Final conclusions**

The survey on this reduced focus group shows a declared level of satisfactory or even very satisfactory training: a majority of professionals feel themselves trained and “aware” of the evolutions of their sector.

If they declare they have the relevant knowledge, techniques and skills in administration and daily management, it seems that they need to be guided and professionalized in the sharpest domains linked to the most current trends of consumption which importance they still neglect. Besides, the degree of information, of motivation and of involvement is particularly raised.

However, they clearly notice their need to evolve with their company, their need to acquire the useful skills which would be essential to the continued existence on their trade. These needs are considered as constituting substantial value added.

Their request goes towards personalized counseling which contents would belong to the ground with adapted ones, methods and sometime answering to the numerous constraints linked to the sector, training peons registered in their contents and rhythm, as well as in the reality of their workpeace.