

Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020

November 2015

Full Report

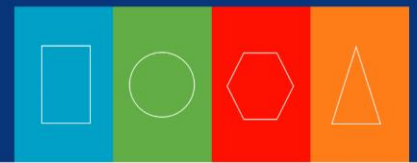
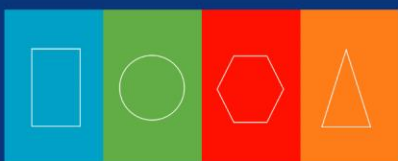
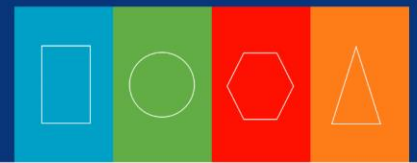


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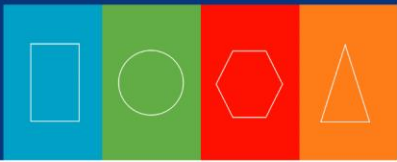
Acknowledgements

The EGFSN Secretariat would like to record its appreciation to the Members of the Steering Group who oversaw the progress and development of the report and provided additional valuable input. (the membership is set out in Appendix 5).

We wish to acknowledge the high quality and expertise of Indecon International Economic Consultants whose work included the undertaking of the research and consultations and workshops with enterprises and stakeholders, the modelling of the hospitality skills demand scenarios up to 2020; the review of international approaches and the integration and drafting of all the various research elements of the report.

We wish to acknowledge the inputs and assistance of SOLAS's Skills and Labour Market Research Unit, who provided access to detailed data and analysis for the purposes of this assessment, and provided valuable inputs to the Steering Group.

We would like to gratefully acknowledge the invaluable inputs made to this review by businesses and employees in the Hospitality sector, including participants at the regional workshops held in Galway, Killarney and Dublin, and businesses who responded to the structured survey interviews and the questionnaire-based surveys.

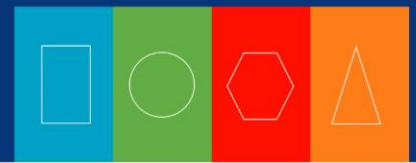


Introduction to the Expert Group on Future Skills Needs

The Expert Group on Future Skills Needs (EGFSN) advises the Irish Government on current and future skills needs of the economy and on other labour market issues that impact on Ireland's enterprise and employment growth. It has a central role in ensuring that labour market needs for skilled workers are anticipated and met.

Established in 1997, the EGFSN reports to the Minister for Education and Skills and the Minister for Jobs, Enterprise and Innovation.

The Strategic Policy Division within the Department of Jobs, Enterprise and Innovation in conjunction with the Skills and Labour Market Research Unit, SOLAS, provides the EGFSN with research and analysis support.



Foreword

The objective of this study is to assess the skills demand needs arising within the Hospitality sector in Ireland - hotels, restaurants, bars, canteens and catering - over the period to 2020. The aim is to ensure that there will be the right supply of skills to help drive domestic hospitality sector business and employment growth.



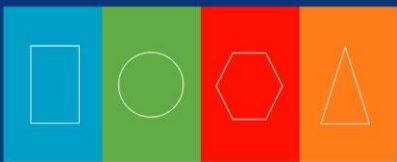
The Hospitality sector is one of the most important services sectors in the Irish economy. It directly employs 158,000 persons within 16,000 enterprises. This represents 8% of current economy-wide employment. The sector contributes €3 billion gross value added to the economy. It also makes a valuable contribution to regional and local economies, and provides flexible employment opportunities that can facilitate greater labour market participation.

A recovery in the Hospitality sector is leading to increased demand for employees of varying skill levels. The sector offers attractive opportunities to entrepreneurs. A main challenge for the industry is to provide appropriate training and education and clear career progression pathways for those that wish to make hospitality their career. The set of recommendations made within the report are designed to support the professionalisation of the sector and to contribute toward achieving national employment creation targets under the Government's *'Action Plan for Jobs'* and the *Tourism Policy Statement- People, Place and Policy Growing Tourism to 2025*.

While the Hospitality sector has potential for future growth, skill demand shortfalls are likely to emerge in key occupations if action is not taken in the short to medium term. The level of success ultimately achieved in addressing skills requirements will be dependent on industry, education/training and other stakeholders working together on a collaborative basis. The establishment of a National Oversight and Advisory Group to oversee the skills development and promotion of the Hospitality sector is a main recommendation of the report.

I would like to express my appreciation to all those who contributed to the report. Particular thanks are due to the many industry executives, academics and professionals who contributed their valuable time and expertise. I would like to thank Frank Mulvihill who chaired the Steering Group that oversaw the completion of the report and to each member of the Steering Group for their commitment and sharing of expertise. Finally, I would like to thank the EGFSN Secretariat for their research and analysis input and managing this project to a successful conclusion.

Una Halligan
Chairperson, Expert Group on Future Skills Needs



Executive Summary

E.1 Introduction and Background

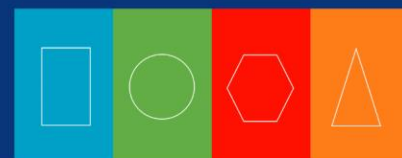
This report by the Expert Group on Future Skills Needs (EGFSN) represents an assessment of future skills requirements within the Hospitality sector in Ireland over the period to 2020. The Study assesses skills demand at all NFQ levels, with a particular focus on career progression opportunities for those at lower skilled levels to help fill anticipated job openings. The Hospitality sector requires a skilled and professional workforce in order to deliver the highest standards of service. A recovery in the sector is leading to increased demand for employees of varying skill levels. Continuing to foster growth in the Tourism sector, with which the Hospitality sector is inextricably linked, is a stated goal of the Government's *'Action Plan for Jobs'* and *Tourism Policy Statement*. The Hospitality sector is an important services sector in the economy, and is estimated to directly employ close to 158,000 persons. It is relatively more important to the Irish economy in terms of employment contribution than is the case for most other European countries. The definition of the hospitality employment used in the study takes into account employment in the accommodation and food services sector and also employment in related sectors for key hospitality-related occupations.

E1.1 Methodology

The research programme for the study was managed by the Secretariat to the Expert Group on Future Skills Needs within the Department of Jobs, Enterprise and Innovation. Its progress was overseen by a Steering Group made up of industry representatives, education and training bodies and relevant agencies, including Fáilte Ireland, SOLAS, Higher Education Authority and the Department of Transport, Tourism and Sport. A rigorous methodology was applied in undertaking this assessment. This was supported by a programme of engagement with key stakeholders including at three regional workshops held in Dublin, Galway and Killarney, structured survey interviews with hospitality businesses and key informants and a survey of business establishments.

Detailed scenarios were formulated to project the level of skills demand and to identify potential skills shortfalls across main occupational groups. The study includes a comparative analysis and examination of hospitality programmes and initiatives in other countries. Indecon International Economic Consultants were commissioned to undertake this programme of research on behalf of the EGFSN. The EGFSN Secretariat undertook an analysis of supply side provision of hospitality related skills.

The report identifies a set of policy recommendations and associated measures designed to address the anticipated skill requirements of the Hospitality sector. This process benefited from the valuable input into the research and drafting of the recommendations from the members of the Steering Group at several meetings.



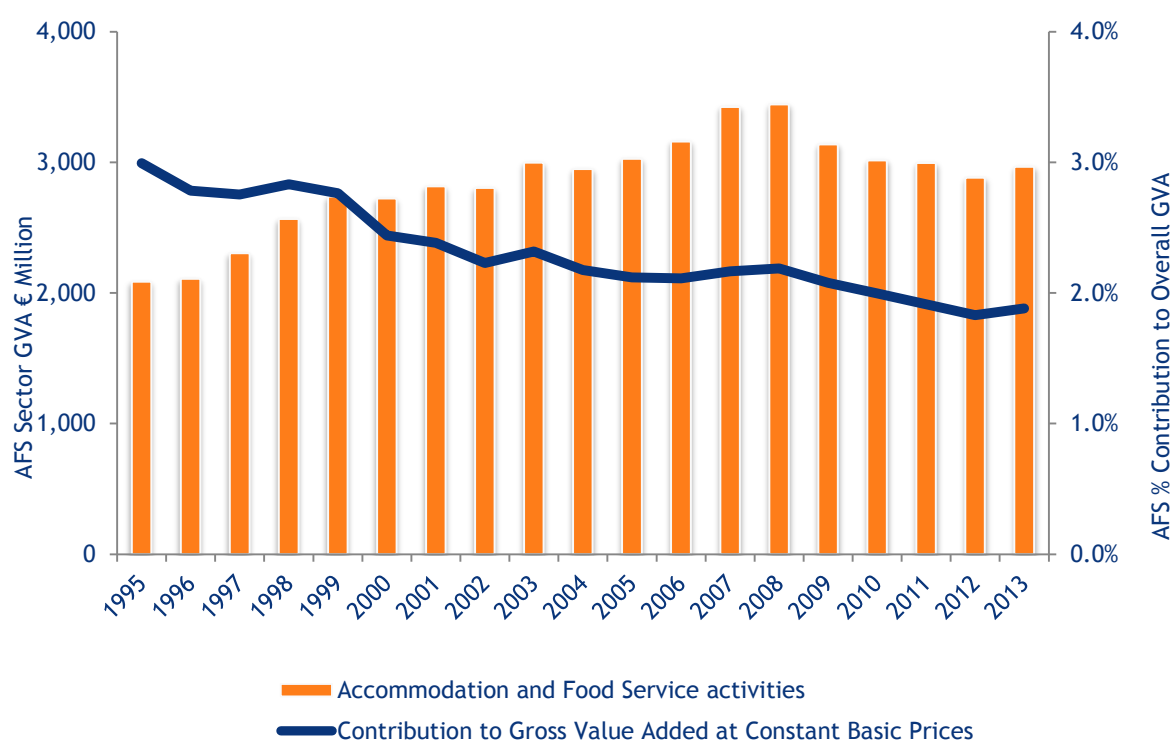
E.2 Profile of the Hospitality Sector

The Hospitality sector in Ireland is comprised of hotels, restaurants, bars, pubs, canteens and catering operators. The sector caters to domestic consumers including home vacationers, eating out, in-house catering, pubs, etc., so its growth and success is strongly influenced by domestic consumer demand. Activity in the sector is also inextricably linked to the tourism industry and to the spending by the number of visitors to the State.

There are over 16,000 enterprises in the hospitality-related Accommodation and Food Services (AFS) sector in Ireland. Hotels and other accommodation account for 14% of these enterprises, while restaurants/mobile food service activities and beverage serving activities/bars each represent 41% of the total, with the remainder (4%) accounted for by catering and other food service providers. A particular feature of the sector is the concentration of employment in small and medium-sized enterprises, with the majority (over 80%) of businesses employing fewer than 10 people.

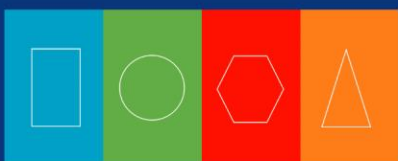
In terms of overall economic contribution, accommodation and food service activities accounted for €3 billion, or nearly 2% of total gross value added (GVA) in the Irish economy in 2013 (Figure E.1). The contribution of the sector reached a peak in 2008 but, like many other sectors in the Irish economy, was affected by the economic recession in 2009-2011. The sector has, however, started to recover since 2012 and an important issue concerns the impact of this recovery on skills demand.

Figure E.1 Trends in Gross Value Added Contribution of Accommodation & Food Service Enterprises



Note: GVA given at constant basic prices.

Source: Indecon analysis of CSO National Income and Expenditure Results 2013.



Employment in Hospitality Sector Occupations

To assess the future skills requirements in the Hospitality sector it is necessary to firstly establish its current employment levels and the characteristics of employment.

However, of importance is that no precise and comprehensive definition of employment in the Hospitality sector exists in official statistical publications. To arrive at a comprehensive estimate of employment in the sector, access was provided by the SOLAS Skills and Labour Market Research Unit to data from the CSO's Quarterly National Household Survey for hospitality-related sectors and occupations (by four-digit 2010 SOC code classification).

This enabled an identification and grouping of sectoral and occupational employment data. The estimate takes employment in the Accommodation and Food Services sector as a starting point, but also includes employment in additional sectors for certain key hospitality-related occupations.

It is estimated that 157,990 persons were employed in hospitality-related roles in the Irish economy during 2014 (based on an average through the four quarters of the year). This is presented in Table E.1 at a detailed occupation level. The largest concentrations of employment are among waiters/waitresses (27,509 or 17.4% of the total); chefs (23,948 or 15.2%); kitchen/catering assistants (23,255 persons or 14.7%); bar staff (18,719 or 11.8%); and hotel/accommodation managers and proprietors (8,242 or 5.2% of employment). These specific occupations together represented almost two-thirds of hospitality-related employment during 2014.

Table E.1 Estimate of Employment in Hospitality Sector in Ireland by Occupation - 2014

Hospitality-related Occupation	2014 (Quarterly Average)
Waiters and waitresses	27,509
Chefs	23,948
Kitchen and catering assistants	23,255
Bar staff	18,719
Hotel and accommodation managers and proprietors	8,242
Restaurant and catering managers and proprietors	6,299
Catering and bar managers	5,724
Sales and Retail Assistants	5,504
Cleaners and domestics	3,810
Publicans and managers of licensed premises	3,436
Receptionists	3,087
Other occupations*	28,457
Total Hospitality Sector	157,990

* "Other occupations" consist of occupations in the hospitality-related 'Accommodation and Food Services' (AFS) sector for which the numbers employed are less than 3,000 and therefore cannot be separately identified within the constraints of statistical sample robustness. All occupations within this total each account for <2% of total employment in the AFS sector.

Source: SOLAS/SLMRU analysis of data from QNHS and Indecon sectoral/occupational allocations and analysis.

On a comparative level, Ireland was ranked 5th in the EU in relation to the proportion of overall economy-wide employment accounted for by the hospitality-related accommodation and food services sector, representing 7.3% of economy-wide employment (Figure E.2). The average for the EU was 4.6%. These figures indicate the relative importance of the AFS sector to overall employment in Ireland.

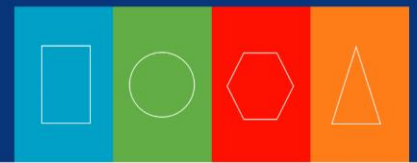
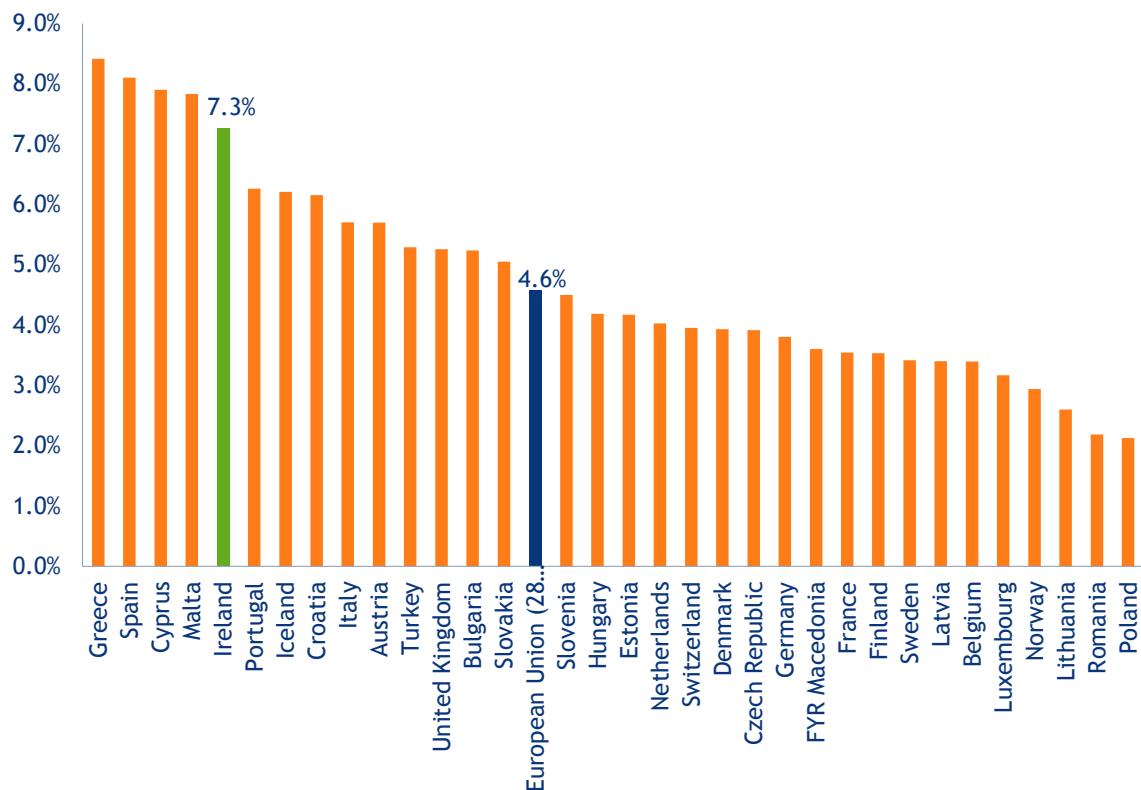


Figure E.2 Employment in AFS Sector as a percentage of Economy-Wide Employment 2014

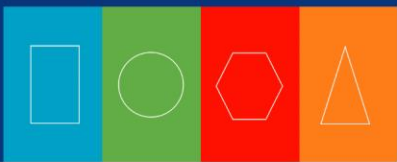


Note: Persons in employment aged 15-64.
Source: Indecon analysis of Eurostat data.

E2.1 Other Key Features

A number of key findings from the analysis are highlighted below:

- Overall employment in the sector declined between 2008 and 2011. The rebound in the sector since then and the impact of other key drivers of change has implications for skill demand.
- Employment in the sector is characterised by significant seasonal fluctuations.
- Part-time employment is an important component of employment in the sector. Full-time employment stood at 60% versus 40% part-time in 2014, compared with a 77% to 23% ratio across all sectors of the Irish economy.
- Irish nationals accounted for 69% of employees in the sector during 2014. This is lower than the proportion of Irish employees in the wider economy (85%), signalling the importance of factoring migration into the assessment of possible sources of future skills supply in the sector.
- There are a significant number of skilled persons on the Live Register registered with Intreo employment services, who are seeking employment in hospitality occupations. However, these individuals may need support, including appropriate training/upskilling, to return to work.
- Average hourly earnings rates in the Hospitality sector are ranked at the lower end of the range of sectoral categories monitored by the CSO. Average hourly earnings declined in both the accommodation and the food and beverage services sectors from 2008 to 2014.



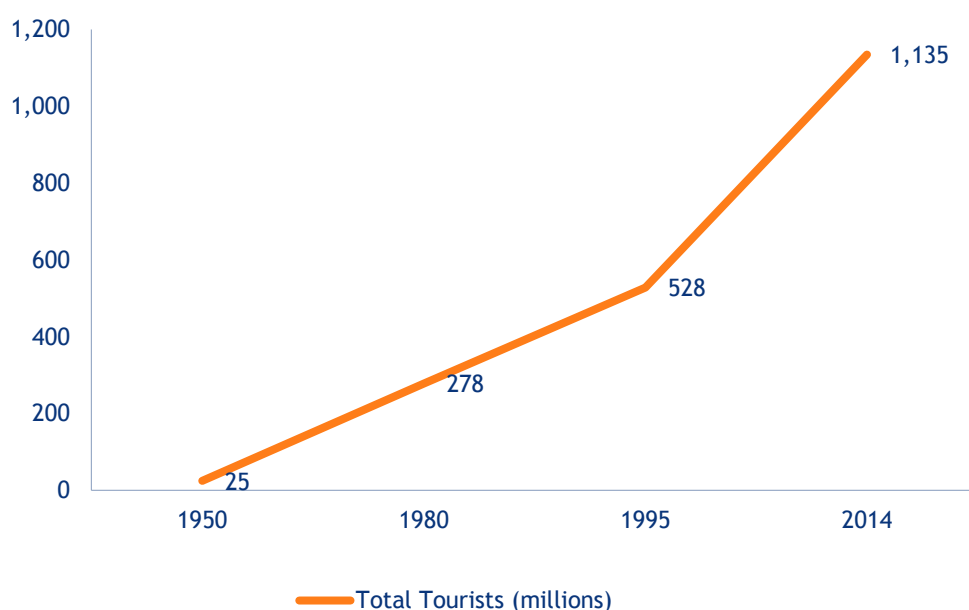
- There are high rates of exit/replacement among certain occupations in the sector, notably among waiters/waitresses and bar staff, at 25% and 20%, respectively, in 2014 (although these exit rates are mitigated by a consistent annual supply of students), in contrast to the 4% reported for chefs. Other factors being equal, high levels of exit among staff will increase the replacement component of future skills requirements in the sector.
- High replacement rates have implications for ongoing skill demand requirements for hospitality-related occupations and are important for the purposes of considering various strategies with regards to staff retention, including education and training, and workplace conditions and remuneration. A challenge for the sector is the need to retain staff by providing appropriate education and training, and attractive career paths for individuals that wish to make hospitality a long-term career choice.

E2.2 Drivers of Change impacting on Skills Demand

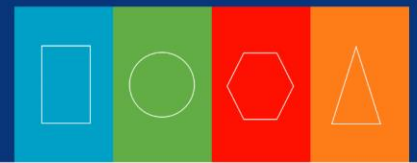
International Tourist Demand

An important driver of overall activity - and therefore demand for skills - in the Hospitality sector is international tourism demand. On an international level, the United Nations World Tourism Organisation reports that tourism accounts for 9% of global GDP, 6% of the world's exports and one in 11 jobs around the globe. In 2014, annual worldwide growth in international tourism was 4.7%. The growing trend in global tourism is illustrated in Figure E.3. Under a scenario whereby Ireland maintains its existing share of international tourism, it would be expected that overseas visitor numbers and associated expenditures would increase, and this would in turn be expected to impact on activity levels and hospitality skills demand. It should be noted that the total number of overseas visits to Ireland by non-residents increased by 8.8% between 2013 and 2014.

Figure E.3 Historical Trend in Global International Tourist Numbers



Source: Indecon analysis of UNWTO data



Level of Domestic Consumer Discretionary Spending

The Hospitality sector also caters to domestic consumers including home vacationers, eating out, in-house catering, pubs, etc., so its growth and success is also strongly influenced by domestic consumer demand. It is notable that overall employment in the Hospitality sector declined between 2008 and 2011, as the economic recession within Ireland impacted on domestic consumer spending.

Value Competitiveness

The value of hospitality business offerings in terms of both price and quality is a main determinant of customer demand. For international tourists this includes the relative value of the euro, and hospitality establishments here sustaining a competitive cost base and quality offering vis-a-vis other competitor destinations. Reacting to the growth of online agencies who can charge high commissions especially for premium placements, hotels are now highlighting the benefits of direct booking. Equally, the growth of third party restaurant discount vouchers/deal websites that promote deep discounts and can charge high commissions is spurring restaurateurs to engage in direct marketing initiatives with consumers. There has been significant growth of collaborative/sharing platforms such as AirBnB.

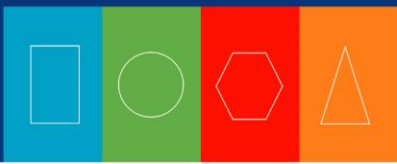
Changing Consumer Demand

Key demographic and market segment trends likely to impact on the demand for hospitality-related skills include:

- Aging populations will alter the mix and nature of hospitality products and services required.
- Continuing growth in the number of “digital travellers” using mobile platforms and applications.
- The on-going increase in overseas travel by Asian travellers, particularly Chinese.
- The growth in numbers of “millennials”, the fastest growing market segment, described as those with a strong focus on empathy, personal customer connection and personalised and local service offerings, expected to reach 50% of all travellers by 2025.
- More health and environmentally-conscious travellers wanting to maintain healthy and sustainable carbon-neutral lifestyles including access to fitness and well-being facilities.

Growth of new Hospitality products and Services

Front-of-house staff need to regularly update their knowledge of local tourist offerings appropriate to individual clients; many will have already researched alternatives online. With a growth in demand for healthy, local and personalised food and drink, often traceable back to the organic producer, chefs need the knowledge, skills, flexibility and customer service-mindedness to select suppliers and ingredients and deliver more individualised dishes to clients who may also have special dietary requirements. The smartphone and tablet are important tools for such flexible training and other employee workplace uses, especially for training in policies, procedures and regulations.



Technological Trends

Relevant technologies include those which facilitate customer interaction and increased efficiency within businesses. Accommodation sales, marketing and revenue management staff need continually to update their skills in the use of systems and tools to identify prospects and deliver customers at optimum occupancy rates. Restaurant and banqueting managers and front-of-house staff will also require CPD to help them maximize restaurant and function profitability. Training approaches need to adapt to be more accessible and flexible to accommodate hospitality business schedules and seasonality. This is particularly the case for SMEs.

Seasonal Nature of Demand

Employment in the AFS sector is characterised by large seasonal fluctuations. The seasonal nature of employment in the sector is evident by the pattern of annual peaks in employment, which tend to occur in the third quarter of each year. This seasonal trend is less evident in the Dublin Region.

E.3 Stakeholder Engagement

An important feature of the analysis was an extensive programme of engagement with a wide range of stakeholders in the Hospitality sector. This included:

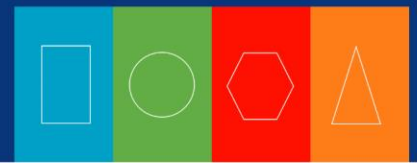
- Regional workshops held in Galway, Killarney and Dublin involving discussion and interaction with hospitality sector businesses, educators and other key informants;
- Structured survey interviews with hospitality sector educators, industry representative associations and other key informants;
- Further stakeholder engagement and consultation with educators and industry representative associations, through meetings with and feedback from the Steering Group; and,
- A detailed questionnaire-based survey of hospitality businesses.

The inputs gathered from this stakeholder engagement were analysed and synthesised. They provide important insights with respect to skills demand in the sector. The main findings are summarised below.

Current Skills Demand

To ensure the sector realises its significant potential for creation of additional employment it is important to identify current skills shortages to be overcome and to anticipate future skills requirements. A main skills shortage identified by hospitality businesses were for suitably qualified chefs. Shortages of commis chefs feed into shortages at higher and specialist levels, e.g., demi chef, chef de partie, and pastry chef. In addition, there are significant skill shortfalls emerging among front-of-house waiting and other staff.

Across the sector, there are stated gaps in basic skills and experience at entry and junior level, and at management level. There is also a need for tourism entrepreneurs and product development. Stakeholders indicated that there are sometimes large numbers of applications submitted in



response to job advertisements in the sector but that the majority can be deemed not to be appropriately qualified. Other specific skill gaps identified by hospitality businesses included:

- Management skills, e.g., revenue managers with local knowledge, food and beverage supervisors with management skills, HR skills, general management skills for business owners;
- Specialised reception and front-of-house skills;
- Bar staff with waiting skills for food service and modern drink skills;
- Executive housekeepers;
- Sales and marketing executives;
- Customer service-mindedness and up-selling skills; and,
- Specialist knowledge: employment law, licensing law, consumer law, minimum pricing, allergens.

There is some variance highlighted in relation to skills gaps by geographic location, although not always higher in remote locations. According to businesses, without action the same key skills gaps are anticipated to increase over time.

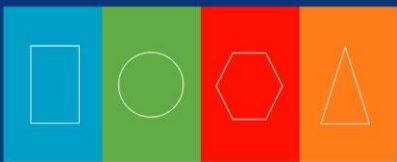
Reasons given by Stakeholders for Skills Shortages

The main reasons stated by stakeholders for the skill gaps in the Hospitality sector are insufficient numbers of people in Ireland with the appropriate training and the right level of experience. Also relevant are the relatively poor reputation and perception of the sector. It is important to recognise that the sector provides employment opportunities for a range of skills. This includes skilled professionals and entrepreneurs, people with high levels of customer service and customer-facing skills, and technical skills in areas such as marketing, accountancy and specialist services, as well as junior entry-level kitchen and front-of-house staff.

Nevertheless, the reputation and perceptions of the sector should be improved based on systematic investment by business establishments in further skills development, enhanced HRM processes and other initiatives to further professionalise the sector and continue to build employee respect, loyalty and retention.

In relation to training, some of the reasons suggested for skills gaps included an imbalance between academic and hands-on training, a need for basic and specialised practical skills, and for the provision of greater numbers of accessible and flexible continuing professional development, apprenticeship and career traineeship schemes.

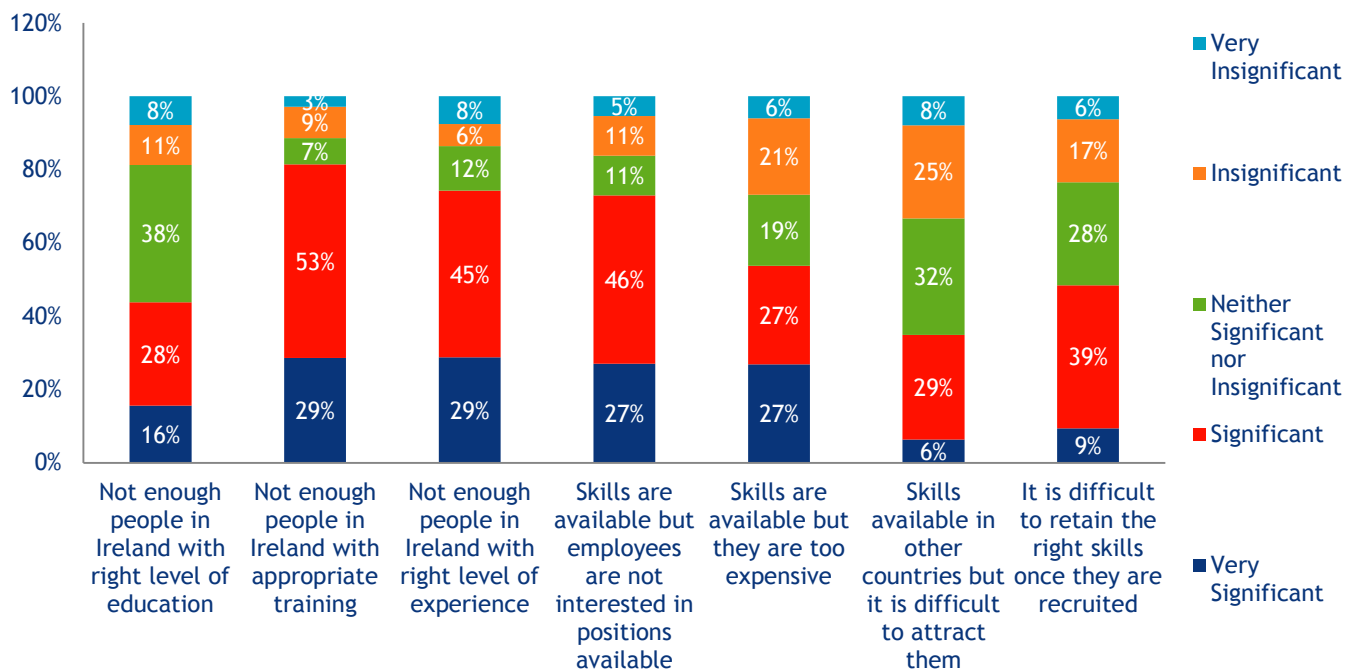
Stakeholders related a number of common perceptions of the sector, including, for example, the idea that jobs in the sector are only a “stop-gap” while studying and that working in hospitality is not considered by some as a viable career choice. There is also a societal and family focus on CAO points and getting a third-level education and some peer pressure to pursue non-hospitality careers. This is influenced by parental judgement and by the advice of some school guidance counsellors.



Furthermore, there is currently no interview process for some Institute of Technology courses and candidate selection is made based on CAO points only. It should be noted however that other programmes such as the Minor Award in Culinary Arts, the National Traineeship and the Certificate in Culinary Skills are all interview-based.

Figure E.4 illustrates the views of stakeholders in the Hospitality sector on the main reasons for skill gaps.

Figure E.4 Views on Significance of Reasons for any Skill Gaps - % of Responding Hospitality Businesses

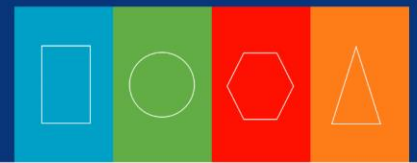


Source: Indecon Survey of Hospitality-Related Organisations

Responses by Hospitality Businesses to Skills Gaps

Hospitality businesses stated that they have responded to skills gaps with initiatives such as:

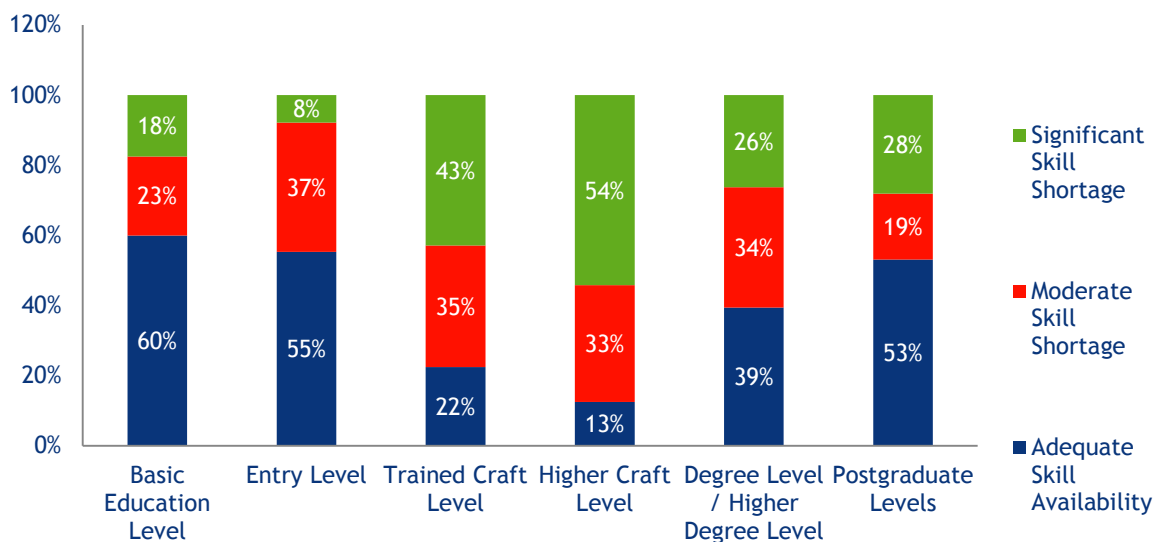
- Increased emphasis on in-house/on-the-job training tailored to immediate needs;
- Overseas recruitment (often through personal contacts of existing staff);
- Induction programmes for entry-level jobs;
- Basic skills training and up-skilling of existing staff within organisations;
- Re-skilling existing staff for new roles within the organisation;
- Personal training plans for all staff;
- Reduction and simplification of menus;
- Recruitment of trainees/interns from Irish and foreign schools; and,
- Development of career progression and retention initiatives.



Future Skills Requirements

The views from stakeholders were obtained at three regional meetings regarding their assessment of specific areas of skills gaps likely to continue into the future. Additional feedback was obtained from the survey of Hospitality sector organisations. It was found that the areas with current skill gaps are also the ones expected to continue into the future. Higher Craft Level (NFQ Levels 5 and 6) is expected by 87% of respondents to have a significant or moderate skill shortage. Trained Craft Level (NFQ Level 4) is expected by 88% of respondents to have a significant or moderate skill shortage. Respondents' expectations at other training levels can be seen in Figure E.5.

Figure E.5 Future Skills Requirements - % of Responding Hospitality Businesses

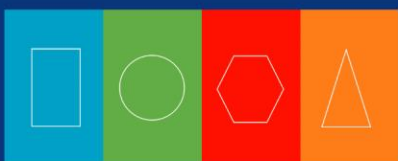


Note: Basic Education Level = NFQ Levels 1 and 2; Entry Level = NFQ Level 3; Trained Craft Level = NFQ Level 4; Higher Craft Level = NFQ Level 5 and 6; Degree Level / Higher Degree Level = NFQ Levels 7 and 8; Postgraduate Levels = NFQ Levels 9 and 10.

Source: Indecon Survey of Hospitality-Related Organisations

Analysis of Current Education and Training Supply

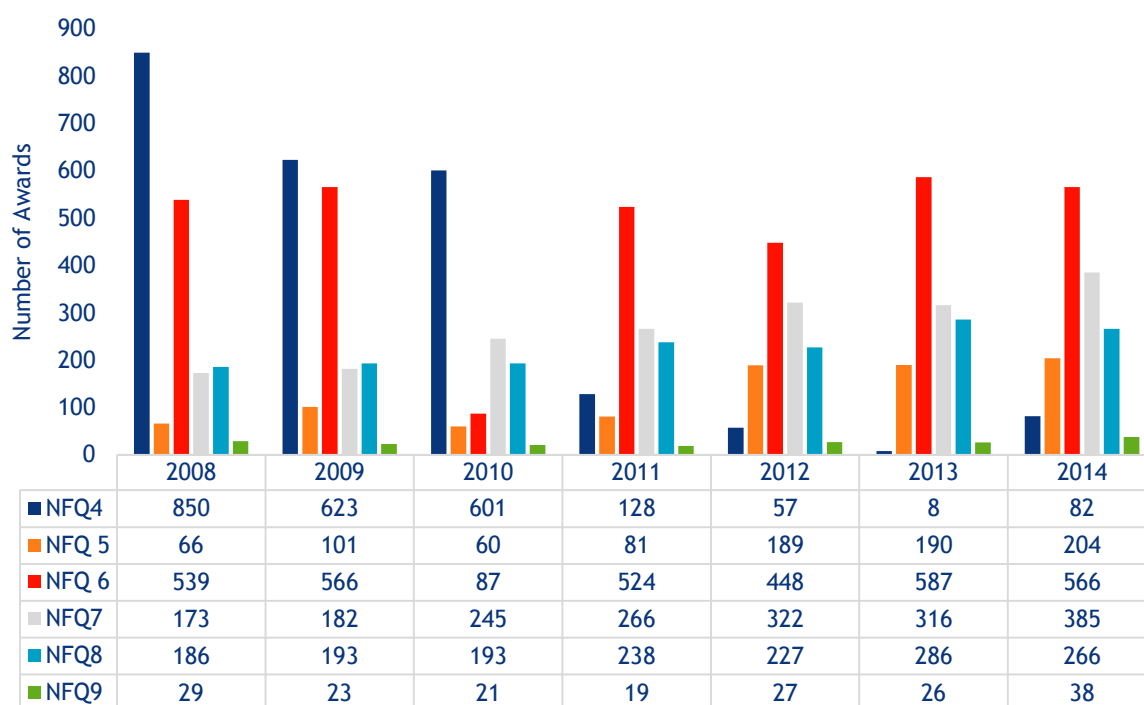
A key aspect of skills provision in the Hospitality sector concerns the outputs of the education and training system. An analysis was undertaken of current education and training provision in the sector. Formal education is provided at various qualification levels via both institutes of Higher Education (HE) and Further Education and Training (FET). The HE institutes typically provide courses at National Framework of Qualifications (NFQ) Level 6 to Level 10, while FET institutes provide courses from NFQ Level 1 to Level 6. Major awards in the Hospitality sector are offered for NFQ Levels 3 to 9. However, significant training is provided on-the-job. Nine Institutes of Technology (which award degrees under delegated authority from QQI) and Dublin Institute of Technology (which has full degree-awarding authority) provide hospitality-related higher education, as do other



third-level institutions such as the Shannon College of Hotel Management and Griffith College. Education and Training Boards (ETBs) are the primary providers of further education and training. Training in areas such as food safety is provided through the National Hygiene Partnership and online courses are available internationally. The wide range and somewhat fragmented nature of education and training provision for the Hospitality sector is noteworthy.

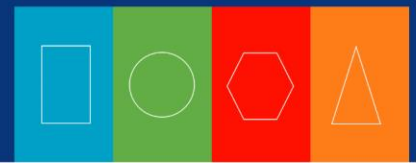
Figure E.6 presents a summary of all major hospitality-related awards by year from 2008 to 2014, encompassing higher education and further education and training. The numbers include both HEA-funded institutions, the Shannon College of Hotel Management and Griffith College in Dublin. There has been an increase in the total number of hospitality-related awards across NFQ Levels 6 to 9 since 2010. However, there was a significant fall in the number of further education and training awards at Level 4 which fell from 850 in 2008 to eight in 2013, before rebounding to 82 in 2014.

Figure E.6 Hospitality-related Major Awards 2008-2014



Source: EGFSN/DJEI

The types of awards give an indication of the nature of training undertaken in the sector. At least 38% of hospitality-related courses offered through higher education institutes are specialist management courses. Further education and training Minor and Special Purpose awards are primarily undertaken in areas such as catering and culinary, food safety and hygiene, and customer care, whereas major awards are concentrated in the areas of accommodation, specialist catering and culinary arts. Recent initiatives developed by SOLAS include the Momentum Programme in 2014 and 2015 (aimed at the long-term unemployed) that will make available 1,500 places in tourism, i.e., accommodation, food and beverage and pilot career traineeship programmes. In addition, it is estimated that new chef-related apprenticeships approved by the Apprenticeship Council, which are being led by the Irish Hotels Federation, the Restaurants Association of Ireland, IT Tralee and Eurotoques, will deliver approximately 130-150 chef-related apprenticeships on an annual basis. Four



new ETB courses were due to commence in 2015. There are also a number of hospitality-related Springboard+ programmes funded by Government, with 83 places on courses in 2015 and 20 places planned for September 2016. There is currently no dedicated Hospitality Skillnet although there are some hospitality training programmes being run by certain Skillnet such as South-West Gno Skillnet.

E.4 Scenarios of Future Demand for Skills

This assessment examined two alternative scenarios for the evolution of hospitality skills demand over the period 2015-2020. For each scenario, the analysis identified a breakdown of anticipated skill requirements by occupational category that results from expansionary demand (due to business growth) and replacement demand (arising as a result of the ongoing exit of staff from the sector).

The analysis was then combined with assumptions with regard to prospective future education and training output, to assess the possible implications for skills supply of new entrants to hospitality occupations coming through the education and training sector, and to identify the likely skills shortfalls. The analysis also considered a set of illustrative scenarios, at the level of specific occupational categories, with regard to potential sources of new skills supply that could address potential skills shortfalls. Table E.2 summarises the scenarios examined and the associated projections for employment in Hospitality sector occupations over the six years to 2020.

Table E.2 Scenarios of Total Employment in the Hospitality Sector

	<i>Total Employment in Hospitality-related Occupations - 2014</i>	<i>Total Employment in Hospitality-related Occupations by 2020</i>	<i>% Growth viz. 2014</i>
Scenario 1: Based on growth implied by Tourism Policy Statement targets	157,990	179,530	13.6%
Scenario 2: Based on ESRI 'Economic Recovery' scenario	157,990	167,980	6.3%

Source: Indecon analysis

Scenario 1 assumes that the targets for employment in the Tourism sector stated in the Government's Tourism Policy Statement report¹ are met and that employment in the Hospitality sector, inextricably linked with the Tourism sector, grows in line with these targets. Employment growth projections in Scenario 2 are informed by an analysis of the Recovery Scenario in the ESRI's Medium Term Review (MTR). The occupational forecasts under both scenarios are informed by an Indecon survey of employers in the Hospitality sector. The main findings are as follows:

- Under Scenario 1, employment in the Hospitality sector is projected to reach 179,530 jobs by 2020, representing a 13.6% increase from 2014 levels. Significant skills demand are projected in skilled food preparation occupations, administrative staff, and food service staff; and,
- Under Scenario 2, employment in the sector is projected to reach 167,980 jobs by 2020 - an increase of 6.3% from 2014 levels. The highest demand growth is anticipated for chefs/cooks, waiters/waitresses and catering assistants, which is similar to Scenario 1 but at a lower level.

¹ "People, Place And Policy Growing Tourism To 2025" Department of Transport, Tourism and Sport. March 2015.

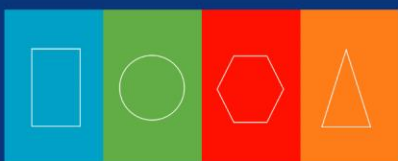


Table E.3 summarises the occupational breakdown of projected overall skills demand over the six-year period 2015 to 2020 implied under Scenario 1. Overall, there is anticipated to be a skills demand across hospitality occupations over this period amounting to an estimated 110,720 persons after the consistent annual inflows of student workers into waiters/waitresses, bar and kitchen/catering staff occupations are taken into account.

Table E.3 Breakdown of Projected Skills Demand Requirements over period 2015-2020 by Expansion and Replacement Demand - Scenario 1

	<i>Requirement Due to Demand Growth</i>	<i>Requirement Due to Gross Exits (Replacement)</i>	<i>Replacement requirement adjusted to reflect estimated annual inflow of students</i>	<i>Total Skills Demand (Expansion + Replacement)</i>
<i>Occupation</i>	A	B	C	D (A+C)
Functional managers and directors n.e.c.	270	2,120	2,120	2,390
Hotel and accommodation managers and proprietors	904	3,733	3,733	4,637
Restaurant and catering managers and proprietors	690	6,146	6,148	6,838
Publicans and managers of licensed premises	237	2,058	2,058	2,295
Receptionists	340	2,805	2,805	3,145
Other Admin Staff in the Hospitality and Food Sector	257	2,785	2,785	3,042
Chefs	3,522	9,347	9,347	12,869
Cooks	510	1,257	1,257	1,767
Catering and bar managers	524	5,894	5,894	6,418
Caring, Leisure, other services	522	2,950	2,950	3,472
Sales & Customer Service	572	5,185	5,185	5,757
Cleaners and domestics	484	2,874	2,874	3,358
Kitchen and catering assistants	3,650	23,477	8,970*	12,620*
Waiters and waitresses	4,855	42,494	5,252*	10,107*
Bar staff	2,504	28,820	13,702*	16,206*
Other elementary service occupations in the sector	465	4,200	4,200	4,665
Other AFS Employment	1,236	9,897	9,898	11,134
Total	21,542	156,042	89,178	110,720
<i>% of Total Demand</i>	20%*		80%	100%

Notes: (1) Totals may not exactly equal the sum of components due to rounding differences in the underlying data. (2) n.e.c. signifies not elsewhere classified.

* Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Source: Indecon Analysis

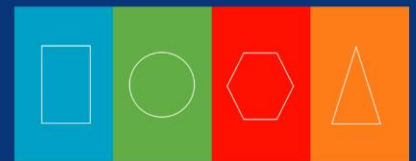


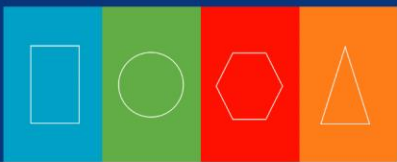
Table E.4 presents a similar detailed breakdown of forecast labour demand in respect of Scenario 2. Under this scenario over the six-year period from 2015 to 2020, there is projected to be a skills demand across hospitality occupations amounting to 96,000 persons when annual inflows of students into waiters/waitresses, bar and kitchen/catering staff occupations are taken into account.

Table E.4 Breakdown of Projected Skills Demand Requirements over period 2015-2020 by Expansion and Replacement Demand - Scenario 2

	<i>Requirement Due to Demand Growth</i>	<i>Requirement Due to Gross Exits (Replacement)</i>	<i>Replacement requirement adjusted to reflect estimated annual inflow of students</i>	<i>Total Skills Demand (Expansion + Replacement)</i>
<i>Occupation</i>	A	B	C	D (A+C)
Functional managers and directors n.e.c.	125	2,065	2,065	2,190
Hotel and accommodation managers and proprietors	419	3,615	3,615	4,034
Restaurant and catering managers and proprietors	320	5,953	5,953	6,273
Publicans and managers of licensed premises	110	2,016	2,016	2,126
Receptionists	158	2,716	2,716	2,874
Other Admin Staff in the Hospitality and Food Sector	119	2,717	2,717	2,836
Chefs	1,632	8,961	8,961	10,593
Cooks	237	1,201	1,201	1,438
Catering and bar managers	243	5,736	5,736	5,979
Caring, Leisure, other services	242	2,850	2,850	3,092
Sales & Customer Service	266	5,028	5,028	5,294
Cleaners and domestics	224	2,784	2,784	3,008
Kitchen and catering assistants	1,691	22,450	8,578*	10,269*
Waiters and waitresses	2,250	40,431	4,998*	7,248*
Bar staff	1,160	27,727	13,184*	14,344*
Other elementary service occupations in the sector	216	4,023	4,023	4,239
Other AFS Employment	573	9,594	9,594	10,167
Total	9,985	149,867	86,019	96,004*
<i>% of Total</i>	<i>10.4%</i>		<i>89.6%</i>	<i>100%</i>

Notes: (1) Totals may not exactly equal the sum of components due to rounding differences in the underlying data. (2) n.e.c. signifies not elsewhere classified. * Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Source: Indecon Analysis



An important feature of the above scenarios is that 80-90% of the projected gross skills demand in the Hospitality sector results from the high level of replacement demand.

The modelling of potential sources of skills supply within the report estimates that education and training provision could provide up to 5,446 trained individuals in chef and other skilled food preparation occupations, up to 3,120 accommodation management occupations and up to 875 food manager occupations. For a number of occupations, including waiters/waitresses, kitchen/catering assistants, and bar staff, it has not been possible to make estimates of annual education and training output. Such potential education and training supply would include further education and training hospitality related minor and special purpose provision and relevant Momentum programme provision. However, to the extent that new entrants come through the further education and training system, other factors being equal this would lower the estimated skills demand shortfalls specifically for kitchen and catering assistants, waiting and bar staff. As indicated in the skill demand scenarios, student workers provide a consistent seasonal source of ongoing labour supply.

The limited data available on the movements of people from inactivity and outside the labour force into hospitality related occupations is also a constraint in estimating skills demand shortfalls. However, the report does provide estimates of the potential number of persons currently on the Live Register who could be retrained / re-employed for certain hospitality occupations including for skilled food preparation occupations, kitchen and catering staff, waiting and bar staff. The impact of alternative assumptions with regard to a reduction in the extent of staff replacement requirements is also modelled within the scenarios to illustrate how such improvements would reduce the projected levels of skills demand shortfall.

While this absence of comprehensive data on annual new entrants from education and training across certain occupational categories may result in some overestimation of projected skills demand shortfalls up to 2020, they are broadly indicative of the occupations in which shortfalls are likely to be most acutely felt.

Sources of skills supply to address demand

Two alternative scenarios have been examined to illustrate the potential sources of skills supply that could address identified skills demand in these occupations over the period 2015-2020. These indicate that addressing projected skills demand is likely to necessitate a combination of approaches, including:

- Provision of additional education and training output, including flexible CPD offerings, and the entry of new skilled staff;
- Re-training of unemployed former Hospitality sector workers;
- Reducing 'under-employment' among part-time workers who wish to increase their hours of work;
- Increasing staff retention and reducing the high extent of exit from certain occupations;
- Increasing the attractiveness of employment opportunities and take-up of vacant positions; and,
- Continuing inward migration of skilled labour.

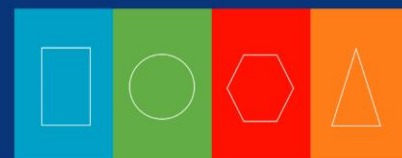


Table E.5 outlines an illustrative scenario of the potential impact of different sources of skills supply to address identified future skill demand among skilled food preparation occupations, including chefs, over the six-year period from 2015 to 2020.

Table E.5: Illustrative Scenario - Potential Sources of New Skills Supply to Address Skill Demand - Skilled Food Preparation Occupations (including Chefs)

Potential Sources of New Supply to Address Identified Skill Demand to 2020 - Skilled Food Preparation Occupations (including Chefs)						
Projected Total Skills Demand 2015-2020	Potential Education/ Training Output*	Re-Training of Unemployed**	Reduction in Exits/Replacement Rate		Balance of Skills Demand Shortfall	
			85%	70%	85%	70%
			% of Existing Replacement Rate			
All Skilled Food Preparation, incl. Chefs, Cooks and other skilled kitchen trades:			85%	70%	85%	70%
Scenario 1						
14,637	5,446	Approx. 1,900 to 2,500	1,590	3,180	5,700	4,110
Scenario 2						
12,032	5,446	Approx. 1,900 to 2,500	1,524	3,049	3,162	1,637

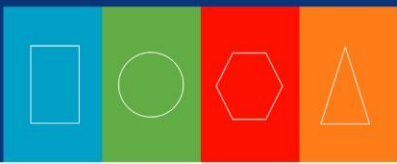
* This assumes that the quantum of education and training output in relevant disciplines remains constant at 2014 levels until 2020. It also assumes that new apprenticeship proposals deliver 134 trained chef apprentices per annum from 2017 to 2020, or a total of 536 over this period. These apprenticeships will cover commis chefs, sous chefs, chefs de partie and executive chefs.

** Based on Live Register statistics May 2015 (data provided by DSP), indicating number of persons who indicated they were fully trained in their former occupation (lower bound of range indicated) or who were fully trained or had some knowledge/expertise in the area (upper bound of range).

Source: Indecon Analysis

Specifically, the above analysis considers the impact of annual education and training output, the re-training/re-employment of relevant categories of unemployed persons on the Live Register, and alternative assumptions with regard to the impact of a reduction in the extent of exit of staff/replacement requirement. In relation to education and training output, the analysis factors in an assumption regarding additional skilled labour in the form of new apprentices. The report of the Apprenticeship Council² set out the proposals of individual organisations in relation to apprenticeships for chefs, covering commis chefs, sous chefs, chefs de partie and executive chefs. On the basis of the information in the Council's June 2015 report, it is prudently assumed that if the five new chef apprenticeship programmes are developed as planned and commence in 2016, that the proposals could deliver 134 trained apprentices per annum from 2017 or an estimated 536

² Report of the Apprenticeship Council, June 2015. See Department of Education: <https://www.education.ie/en/Publications/Policy-Reports/Apprenticeship-Council-Report-on-New-Apprenticeship-Programme-Proposals.pdf>.



apprentices in total over the four-year period 2017-2020 (this would, however, be dependent on meeting the criteria outlined in the Apprenticeship Council report, while such numbers would also need to be agreed with the Council). It is believed that there is scope to further increase apprenticeship numbers in the future, over and above the assumed levels.

Finally, the above scenario also assumes that there are between 1,900 and 2,500 people on the Live Register who can potentially be retrained over the period 2015-2020 to further alleviate the forecast skills demand shortfall for chefs and cooks. This assumption is based on data from the Department of Social Protection which provides information on the existing skill levels of those on the Live Register. For the purpose of determining the estimated skills demand shortfalls, accounting for retraining of the unemployed, the conservative assumption of using the lower bound value of 1,900 has been used in the analysis.

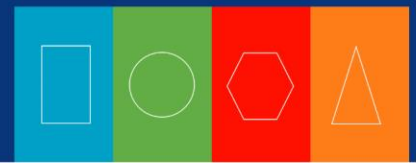
The lower forecast skills demand shortfall for these occupations results from accounting for potential new entrants from education, retraining individuals who are currently unemployed, and reducing the staff exit/replacement rate for skilled food preparation occupations. The baseline model under Scenario 1 forecasts a projected skills demand between 2015 and 2020 of 14,637. Accounting for new entrants from education and retraining of the unemployed, as well as assuming that the replacement rate is reduced to 85% of the base level, results in a forecast skills demand shortfall of 5,700. Assuming that the replacement rate falls to 70% of the baseline rate would further reduce this skills demand shortfall to 4,110 under Scenario 1. A similar scale of potential reduction in the skills gap can be observed for Scenario 2. Recommendations are made in the report in relation to how such skills demand shortfalls may be met.

E.5 International Review of Initiatives to Address Skills Gaps

An international review of initiatives to address skills gaps in other jurisdictions was undertaken. A range of programmes and initiatives were examined within a number of countries that aim at building the supply of talent and skills in the Hospitality sector. The research suggests the potential to adapt aspects of these different international approaches. Countries included in the analysis were: the UK, Netherlands, Switzerland, USA, Norway, Philippines, Germany, Australia, New Zealand, and Canada.

Findings suggest a number of potential areas where future skills development in the Irish Hospitality sector could learn from international approaches and initiatives in this area. The main findings were as follows:

- There is a broad consensus about the importance of balance between a strong vocational education and training system (including apprenticeships and traineeships with significant practical work content) to complement more general hospitality management and academically-focussed courses.
- The Hospitality and Tourism industries, and their various representative bodies internationally, are involved in and often tightly integrated into the process of designing courses of education and training for the sector with education and training institutions. This is increasingly

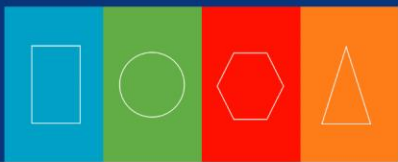


considered an effective way to ensure training remains responsive to labour market and business needs.

- Industry representative bodies are actively promoting the sector to attract new recruits and to counteract common negative perceptions of the sector and it not being a professional career choice.
- Accreditation, portability of skills and hospitality workforce mobility are treated as important.
- Particular attention is being paid to skills mismatches in Europe, seen as one element of the problem of unemployment, particularly youth unemployment.
- Comprehensive online hospitality portals are becoming more common.
- National occupational competency standards drive many education and training systems.
- Training can be contracted out to private sector providers and sometimes government restricts itself to policy, quality control and performance issues.
- Typically there is some form of national/regional oversight system to facilitate effective collaboration between all the many public and private sector stakeholders and educational and training institutions in what is a horizontally and vertically diverse and fragmented sector.

PIAAC Survey Results for Ireland

The OECD Programme for the International Assessment of Adult Competences (PIAAC) includes an assessment of the literacy, numeracy and problem-solving skills of workers within various sectors of the economy. In the PIAAC 2012 survey results for Ireland, 26% of those employed in the Accommodation and Food sector scored at or below Level 1 for numeracy (which along with human health and social work activities was one of the highest percentage of all sectors) while 14% were at or below Level 1 on the literacy scale. Further information is provided in the survey on the frequency of skills use at work. This indicated that workers in the Accommodation and Food sector had a relatively high score for the use of cooperative, dexterity and physical skills compared to other sectors while being average for the use of influencing, learning at work and numeracy skills and relatively lower in the use of writing, reading, ICT, self-organising problem-solving, and task discretion skills.



E.6 Overall Conclusions and Recommendations

Conclusions

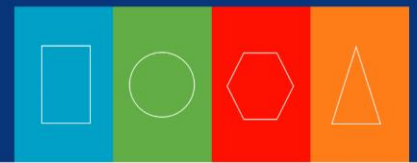
The key conclusions from the assessment are as follows:

- The Hospitality sector plays an important role in the Irish economy, as evidenced by the fact that businesses in the sector together employ an estimated 158,000 persons. This represents over 8% of economy-wide employment.
- Current skills shortages appear most evident at Trained Craft and Higher Craft levels. Among the main areas experiencing shortages is suitably qualified chefs, while shortages of commis chefs feed into shortages at higher and specialist levels, e.g., demi chef, chef de partie, and pastry chef. In addition, there are skills shortfalls emerging among front-of-house waiting and other staff.
- Key Drivers of change are impacting on skills requirements within the sector, include in the areas of management and leadership skills, revenue management, customer service, entrepreneurship, cultural awareness, use of social media to communicate with customers, application of IT systems and tools, knowledge of local tourism offerings, food standards and hygiene, talent attraction and retention practices etc.
- Addressing projected skills demand will require a combination of approaches, including:
 - Provision of additional education and training output, and entry of new skilled staff;
 - Re-training of unemployed former Hospitality sector workers;
 - Increasing the attractiveness of employment opportunities and take-up of vacant positions;
 - Increasing staff retention and reducing the extent of exit from certain occupations; and,
 - Continuing inward migration of skilled labour from the EU/EEA area.

Recommendations

Based on the detailed assessment undertaken in this study, a set of policy recommendations has been identified. These recommendations are designed to address the identified skills requirements of the Hospitality sector over the period to 2020, through measures including further education and training systems, upskilling and re-skilling, continued professional development, talent recruitment and retention practices, and inward migration of skills. The recommendations build on measures and programmes that are already underway, or which are currently under development, including apprenticeship schemes. The associated measures are designed to facilitate further professionalisation of the sector and maximisation of the ongoing contribution of this important sector to the Irish economy, including contribution towards achieving national employment creation targets under the Government's 'Action Plan for Jobs'. The level of success ultimately achieved in addressing the future skills requirements identified in this study will, however, be dependent on industry, education/training and government stakeholders working on a collaborative basis to achieve the goals of ensuring a sufficient quantity and quality of skills.

The detailed set of recommendations is outlined in Section 7 of the report.



1. Introduction, Background and Methodology

1.1 Introduction

This report by the Expert Group on Future Skills Needs (EGFSN) represents an assessment of future skills requirements within the Hospitality sector in Ireland over the period to 2020. The Hospitality sector requires a skilled and professional workforce in order to deliver the highest standards of service. A recovery in the sector is leading to increased demand for employees of varying skill levels. Continuing to foster growth in the Tourism sector, with which the Hospitality sector is inextricably linked, is a stated goal of the Government's *'Action Plan for Jobs'* and *Tourism Policy Statement*.

1.2 Background

The Hospitality sector is an important services sector in the economy, and is estimated to directly employ close to 158,000 persons. It is relatively more important to the Irish economy in terms of employment contribution than is the case for most other European countries. The definition of the hospitality employment used in the study takes into account employment in the accommodation and food services sector and also employment in related sectors for key hospitality-related occupations.

1.3 Scope and Terms of Reference

The focus of the study is on assessing the skills demand needs arising within the Hospitality sector in Ireland - hotels, restaurants, bars, canteens and catering. The aim is to ensure that there will be the right supply of skills - quantity, quality and diversity - to help drive domestic hospitality sector business and employment growth, including through: (a) the higher education and further education systems; (b) upskilling/reskilling; (c) continuing professional development; and (d) talent retention initiatives. The Study assesses skills demand at all NFQ levels, with a particular focus on career progression opportunities for those at lower skilled levels to help fill anticipated job openings.

1.4 Methodological Approach to Assessment

A rigorous methodology was applied in undertaking this assessment, informed by a detailed baseline analysis of key features of the Hospitality sector in Ireland and internationally. Further information was obtained via an extensive programme of engagement with key stakeholders, including three regional workshops, structured survey interviews, and an Indecon survey of business establishments in the sector. An international review was conducted encompassing a comparative analysis and examination of programmes and initiatives in other countries. Two alternative scenarios were developed demand scenarios for the main occupational groups to 2020, and identified potential skills gaps. Finally, a set of recommendations were drafted on measures to address the skills requirements to 2020. Figure 1.1 presents a schematic overview of the methodology and work programme undertaken.

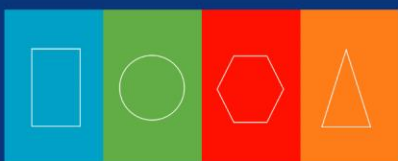
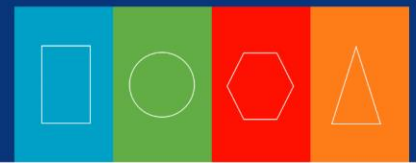


Figure 1.1: Overview of Methodological Approach and Tasks Undertaken

Phase 1: Project Inception; Review of Existing Literature; Baseline Analysis of Sector; Organisation of Stakeholder Engagement/Primary Research
1.1: Project Inception; Finalisation of Scope and Approach
1.2: Identification, Collation and Review of Irish and International Research Literature
1.3: Identification, Collation and Baseline Analysis of Data on Sectoral Characteristics and Trends
1.4: Structuring of Stakeholder Engagement Programme, including Design of Templates/Thematic Guidance to address Research Aims as part of Telephone Interviews and Regional Workshops with Industry and Other Informants/Wider Organisations; and Design of Survey of Hospitality Sector Businesses
Phase 2: Completion of Stakeholder Engagement
2.1: Finalisation of Target Representative Sample of Hotels, Restaurants and Catering Establishments for Structured Telephone Interview Surveys; Issue of Invitations
2.2: Finalisation of Target Representative Sample of Key Informants from Hospitality Sector, incl. Representative Organisations and Training/Education Providers for Structured Telephone Interview Surveys; Issue of Invitations
2.3: Complete Telephone Interviewing and associated minutes and synthesis of findings from surveys
2.4: Organisation of Regional Workshops, incl. Design of Themes and Approach to Break-out and Plenary Discussions; Issue of Invitations to Participants
2.5: Completion of Regional Workshops, analysis and synthesis of findings
2.6: Fieldwork undertaken for Survey of Hospitality Sector Businesses
Phase 3: Demand Scenario Modelling; International Review of Actions in Other Jurisdictions
3.1: Completion of Baseline Analysis of Sectoral Characteristics and Trends
3.2: Specification of Lower and Upper Bound Scenarios for Sectoral Skills Requirements
3.3: Detailed modelling of demand Scenarios
3.4: Formulation of illustrative scenarios for sources of new skills supply to address identified skills demand shortfalls
3.5: Completion of Review of International Approaches
Phase 4: Conclusions, Recommendations and Reporting
4.1: Conclusions from Assessment
4.2: Recommendations, including Measures to Address Identified Skills Supply Requirements (with associated responsibilities and timescales for implementation)
4.3: Integration of Research and Demand Modelling with Assessment of Domestic Current and Planned Skills Supply at NFQ Level; Completion of Assessment Report
4.4: Presentations and Input from Steering Group members; Submission of Assessment Report



1.4.1 Data/information sources

A range of data sources has been utilised as part of the assessment. These include:

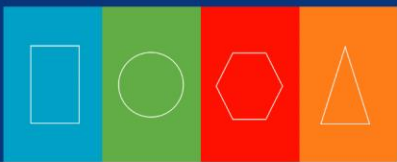
- Data provided to Indecon by SOLAS’s Skills and Labour Market Research Unit (SLMRU), including:
 - Detailed data from the CSO’s Quarterly National Household Survey (QNHS) for hospitality-related sectors and occupations (by 4-digit 2010 SOC code), pertaining to:
 - Employment, unemployment and labour force in for 2008, 2011 and 2014;
 - Employment by age group, highest level of education attained, employment status (part-time), and nationality, for 2008, 2011 and 2014;
- Labour market transitions in hospitality-related sectors and occupations, pertaining to movements between occupations of persons who are in employment, movements between employment and inactivity, and movements between unemployment and inactivity, for 2012-2014 (2014 data from published National Skills Bulletin 2015) and Occupational employment projections to 2020.
- Central Statistics Office (CSO) datasets and reports including the Earnings, Hours and Employment Costs Survey, Business Demography Statistics, National Income and Expenditure Accounts (2013), and the Quarterly National Household Survey;
- Eurostat data for the EU-28 and for Ireland including Employment 2013 and Growth in Employment 2008-2013;
- Department of Education and Skills (DES) data on higher education, providers of higher education, and further education and training;
- Quality and Qualifications Ireland (QQI) National Framework of Qualifications;
- Department of Jobs, Enterprise and Innovation (DJEI) Expert Group on Future Skills Needs and DJEI Hospitality Related Awards 2008-2014; and,
- Further Education and Training Authority (SOLAS) Skills and Labour Market Research Unit reports including the National Skills Bulletin (2013, 2014).

Note re data interpretation: It should be noted that in the analysis presented in this report, outlined in various tables and charts, percentage components may not sum to 100% due to rounding differences. Similarly, in some cases totals may not exactly equal the sum of components due to rounding differences in the underlying data.

1.4.2 Policy and other research materials

The assessment also benefited from a range of key policy and other documents including:

- Fáilte Ireland ‘Competing Through People: A Human Resource Development Strategy for Irish Tourism 2005-2010’;
- United Nations World Trade Organisation “Tourism Towards 2030” and “Tourism Barometer” 2014;
- European Travel Commission “European Tourism 2014 - Trends and Prospects Q3 2014”;
- “A Strategy for Growth: Medium Term Economic Strategy 2014-2020” (Department of Finance (DoF) 2013);



- *Action Plan for Jobs*;
- IDA (Ireland) Strategy; and,
- Various Indecon/London Economics Research Reports.

1.4.3 Primary research

An extensive and comprehensive programme of engagement with stakeholders has informed this assessment including:

- Hospitality businesses;
- Sector representative associations;
- Education/training bodies;
- Government agencies; and,
- Recruitment agencies.

Regional Workshops

Three regional workshops were conducted in Dublin, Galway and Kerry involving participation from 81 hospitality businesses and key informants including:

- 24 Hotels
- 7 Restaurants
- 11 Pubs
- 12 Caterers
- 25 Educators
- 2 Others

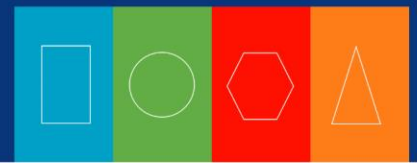
Structured Survey Interviews

The target for the number of structured survey interviews was 55-60, including 40 hospitality businesses and 15-20 key informants. 117 potential respondents were contacted, of which 59 were interviewed. The breakdown of the 40 hospitality businesses interviewed included:

- 16 Hotels
- 14 Restaurants
- 8 Pubs
- 2 Caterers

The 19 key informants interviewed included:

- 9 Educators
- 6 Representative Associations
- 2 Recruitment Agencies
- 2 Others



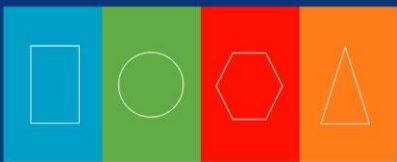
Survey of Hospitality Businesses by Questionnaire

In addition to the structured survey interviews, a separate Indecon survey of businesses was conducted, providing information from 88 additional businesses in the hospitality sector. The characteristics of respondents to this confidential survey are presented in Annex 2.

1.5 Report Structure

The remainder of this report is structured as follows:

- Section 2 presents profiles and emerging trends in the Hospitality sector in both Ireland and internationally. This includes key features of employment within the sector, as well as trends in demand for hospitality activities;
- Section 3 examines evidence from our stakeholder engagement, including workshops and interviews. The focus in the section is on demand and supply of skills, the skills gap, and responses to the skills gap. Information is broken down by occupation;
- Section 4 presents current skills and education provision as a supply analysis;
- Section 5 considers two demand scenarios for hospitality skills into the future. This includes breakdown by occupation across the sector;
- Section 6 comprises an international review of approaches to addressing skills requirements in the Hospitality sector including initiatives led by private businesses as well as by government agencies; and,
- Finally, Section 7 presents conclusions drawn from the analysis and a range of recommendations based on the analysis.



2. Profile of the Hospitality Sector in Ireland

2.1 Introduction

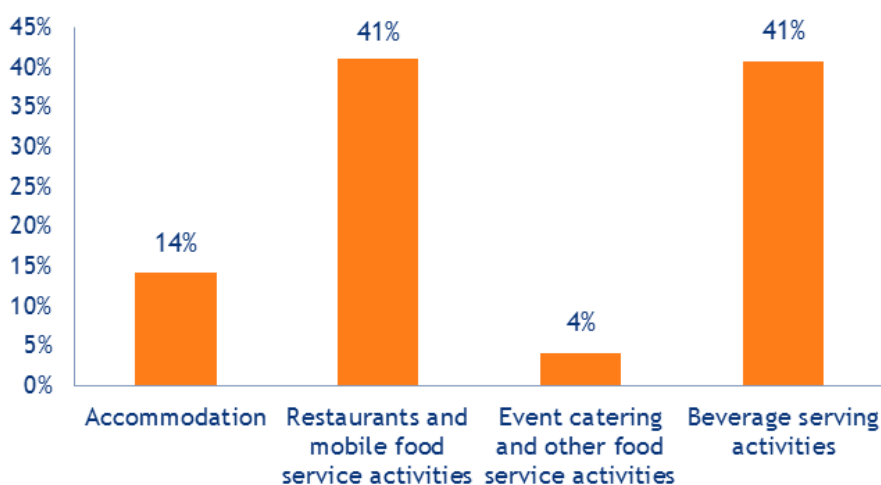
This section provides a concise review of the profile of the Hospitality sector, including the structure of enterprises and the trends in the level and characteristics of employment, earnings and other aspects of work conditions in the sector. The analysis also examines aspects of the sector in a comparative international context, by reference to developments in other EU Member States.

2.2 Structural Features of Hospitality Sector

Industry Structure and Composition

The Hospitality sector is comprised of hotels, restaurants, bars, pubs, canteens and catering operators. An indication of the broad composition of enterprises can be seen in Figure 2.1, which shows the percentage breakdown of the number of enterprises in the associated Accommodation and Food Services sector (AFS). In 2012, the latest year for which the CSO provides business demography figures, the AFS sector in Ireland was comprised of 16,279 enterprises. Hotels and other accommodation accounted for 14% of these enterprises, and restaurants/mobile food service activities and beverage serving activities and bars each represented 41% of the total, with the remainder (4%) accounted for by catering and other food service providers.

Figure 2.1: Structure of Hospitality Sector in Ireland - % of Number of Enterprises by Activity



Note: Figures relates to latest available data for 2012 and cover the Accommodation and Food Services sector.

Source: Indecon analysis of CSO Business Demography statistics.

In terms of employment, a particular feature of the Hospitality sector is the concentration of employment in small and medium-sized enterprises. This is evidenced by the analysis presented in Figure 2.2, which indicates that the majority (80.9%) of businesses in the sector employ fewer than 10 people.

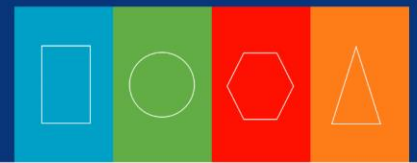
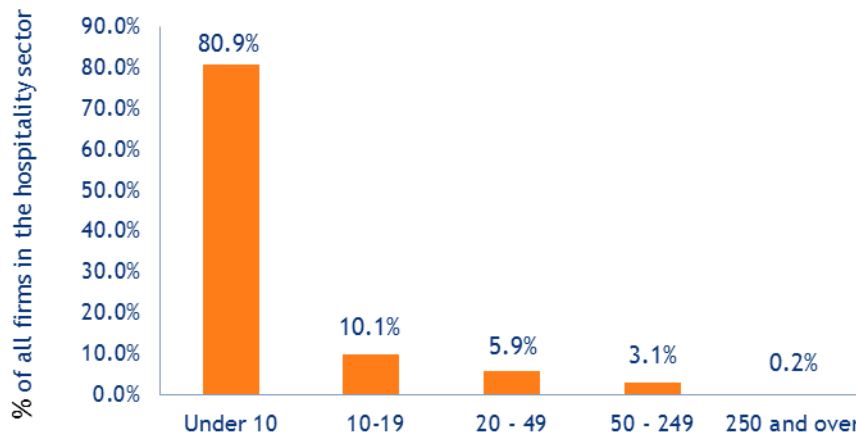


Figure 2.2: Structure of Hospitality Sector in Ireland - % of Enterprises by Employment Size

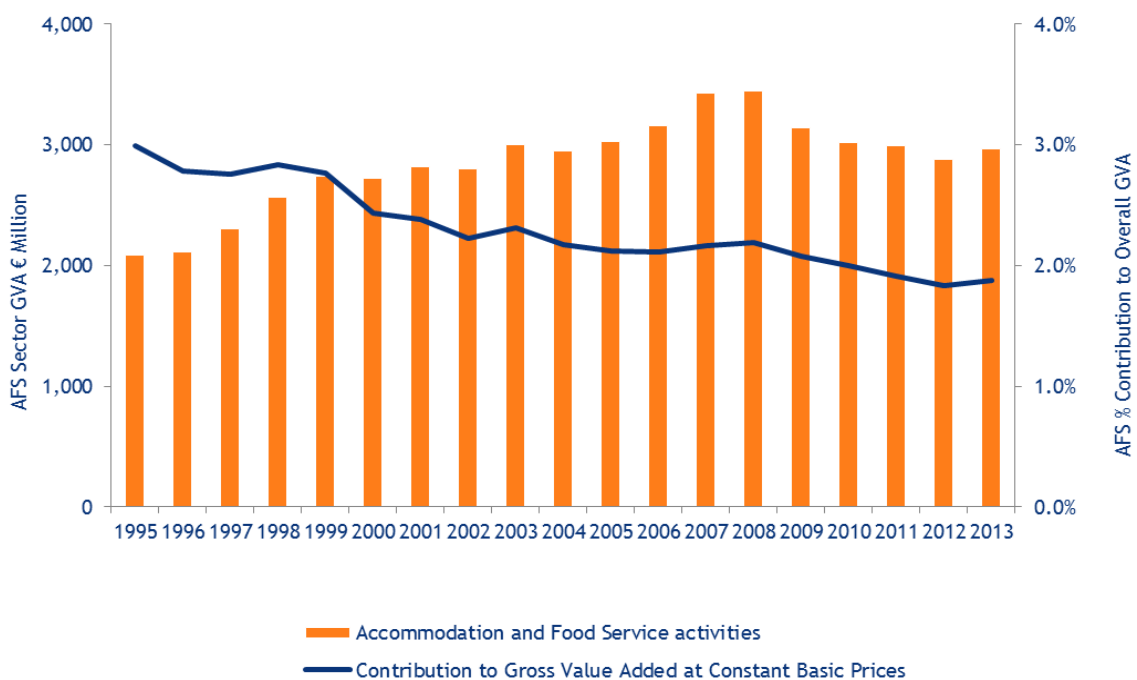


Note: Figures relate to latest available data for 2012 for the Accommodation and Food Services sector. Percentages may not sum exactly to 100% due to rounding differences.

Source: Indecon analysis of CSO Business Demography statistics.

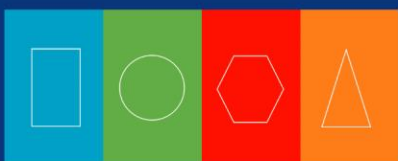
In terms of overall economic contribution, the accommodation and food service activities sector accounted for €3 billion, or nearly 2% of total gross value added (GVA at constant basic prices) in the Irish economy in 2013 (Figure 2.3) The contribution of the AFS sector reached a peak in 2008 but, like other sectors in the Irish economy, was affected by the economic recession in 2009-2011.

Figure 2.3: Contribution of Hospitality Sector to Irish GDP - Recent Trends in Gross Value Added Contribution of Accommodation and Food Service Enterprises



Note: GVA given at constant basic prices.

Source: Indecon analysis of CSO National Income and Expenditure Results 2013.



In 2012, the latest year for which the CSO reports turnover data, the accommodation component of the accommodation and food services sector had an annual turnover of €2.6 billion and the food and beverage service sector had a turnover of €5.3 billion. The 2012 figures are lower than in 2008; however, turnover in the accommodation sector has increased again since 2010, and the rate of turnover decline in the food and beverage services sector has slowed.

Table 2.1: Turnover in Accommodation and Food Service Activities Sectors

	2008	2009	2010	2011	2012
	€ m	€ m	€ m	€ m	€ m
Accommodation	3,067	2,568	2,283	2,423	2,590
Food and beverage service activities	6,610	5,825	5,485	5,447	5,322
Total Accommodation and Food Service Activities	9,677	8,392	7,768	7,870	7,912

Note: Totals may not exactly equal the sum of components due to rounding differences in the underlying data.

Source: Indecon analysis of CSO Annual Services Inquiry data

2.3 Employment and Labour Market Features and Trends

To establish the future skill requirements in the Hospitality sector it is necessary to firstly establish the current position, in terms of the existing employment levels and the characteristics of employment. This section presents the available evidence in relation to the level and nature of employment within the Hospitality sector.

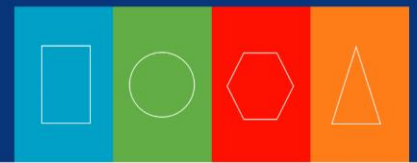
2.3.1 Definitional, methodological and data aspects

Before describing the employment features of the Hospitality sector, certain definitional, methodological and data-related issues must be addressed. In assessing the level of employment in the Hospitality sector, it is of importance that no precise and comprehensive definition of employment in the sector exists in official statistical publications. Sources such as the CSO's Census of Population and the Quarterly National Household Survey (QNHS) include data for a number of relevant sub-sectors and occupations, but these do not comprehensively capture all relevant occupations. It is common practice for the Hospitality sector to be associated primarily with the 'Accommodation and Food Services sector' (which is a NACE³/standard industrial classification-defined sector). However, there are some occupations which operate outside the accommodation and food services sector but which are also hospitality-related. Utilisation of data for the AFS sector alone would therefore miss a number of relevant sectors and occupations.

As noted previously, this study defines the Hospitality sector on an enterprise activity basis, to include hotels, restaurants, bars, canteens and catering service providers. The estimate of employment in the Hospitality sector therefore takes employment in the accommodation and food services sector as a starting point but includes employment in additional sectors for certain key hospitality-related occupations.

To arrive at a comprehensive estimate of overall employment in the Hospitality sector, access was provided by the SOLAS Skills and Labour Market Research Unit to data from the CSO's Quarterly

³ NACE is the statistical classification system of economic activities in the European Community.



National Household Survey for hospitality-related sectors and occupations (by 4-digit 2010 SOC code classification). This enabled identification and grouping of sectoral and occupational employment data. Judgement was required in deciding which sectors and occupations to include in the definition of hospitality-related employment for the purposes of this assessment. The approach applied was to include all employment in occupations that were judged to be most obviously hospitality-related, namely the following occupations:

- Bar staff; Waiters and waitresses; Catering and bar managers; Restaurant and catering managers; Chefs; Cooks; Kitchen and catering; Hotel and accommodation managers; Publicans and managers of licensed premises.

Occupational categories where a judgment was made to include only employment in the Accommodation and Food Services sector or in the Education and Health sectors included:

- Cleaners and Domestic; Receptionists; Sales and Retail Assistants; Housekeepers & Caretakers.

In these instances, only those cleaners/domestics and receptionists who are working within the Accommodation and Food Services sector are included.

2.3.2 Overall employment levels

Table 2.2 presents an illustrative example of methodology applied in the estimation of employment, in this case showing the results for the third quarter of 2014.

The data in the cells in Table 2.2 highlighted in green represent the numbers of persons in employment that were included in the estimate for each occupational category. For example, all bar staff, waiters/waitresses and chefs working in all sectors of the economy are included in the estimate for Hospitality sector employment (i.e., not only persons working in the Accommodation and Food Services sector). However, as noted above, only cleaners/domestics and receptionists working in the Accommodation and Food Services sector are included in the definition applied for the purposes of this study. Overall, based on this definitional approach and aggregating the SOLAS/SLMRU data, it is estimated that a total of 160,400 persons were employed in hospitality-related occupations in the third quarter of 2014.

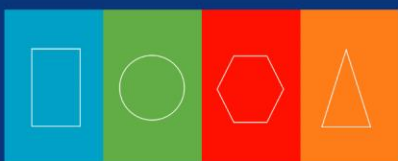


Table 2.2: Illustrative example of approach to Estimation of Employment in Hospitality Sector

	<i>Persons Employed - Accommodation and Food Services Sector - 2014 Q3</i>	<i>Persons Employed - Accommodation and Food, Education and Health Sector -</i>	<i>Persons Employed - All Sectors of Economy</i>	<i>Estimate of Hospitality-Related Employment</i>
Bar Staff	18,600	18,600	19,800	19,800
Waiters and Waitresses	26,400	26,800	28,100	28,100
Cleaners and Domestics	3,600	10,600	31,200	3,600
Receptionists	3,100	6,100	10,700	3,100
Sales & Retail Assistants	5,200	5,700	116,800	5,200
Catering & Bar Managers	4,400	5,300	6,300	6,300
Restaurants & Catering Managers	5,700	5,700	6,400	6,400
Chefs	21,200	23,000	24,700	24,700
Kitchen & Catering	14,200	19,900	23,200	23,200
Housekeepers and related	*	4,100	5,300	*
Cooks	*	*	*	*
Hotel and accommodation managers and proprietors	5,500	6,000	8,000	8,000
Publicans & managers of licensed premises	3,200	3,200	3,300	3,300
Caretakers	*	4,200	7,500	*
Other occupations	28,700	394,200	1,635,600	28,700
Total Hospitality	139,800	533,400	1,926,900	160,400

Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

Notes: (a) Green-shaded cells denote which sector from the QNHS which has been used for the main employment categories.

(b) * indicates that the number of observations is too small to report.

(c) "Other occupations" consist of occupations in the Accommodation and Food Services sector for which the numbers employed are less than 3,000 and therefore cannot be separately identified within the constraints of statistical sample robustness. However, all individual occupations within this total each account for less than 2% of total employment in the Accommodation and Food Services sector. See Annex 4 for a list of occupations included in "Other Occupations".

Table 2.3 applies the above approach for each quarter of 2014, to obtain an average for 2014 as a whole. On this basis, it is estimated that 157,990 persons were employed in hospitality-related roles in the Irish economy during 2014 (based on an average through the four quarters of the year). The detailed breakdown of this total is presented in the table.

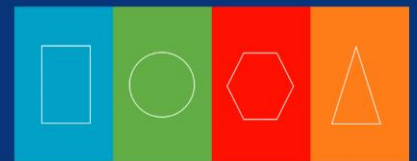


Table 2.3: Indecon Estimate of Employment in Hospitality Sector by Occupation, 2014

Hospitality-related Occupation	2014 - Quarterly Average
Waiters and waitresses	27,509
Chefs	23,948
Kitchen and catering assistants	23,255
Bar staff	18,719
Hotel and accommodation managers and proprietors	8,242
Restaurant and catering managers and proprietors	6,299
Catering and bar managers	5,724
Sales and Retail Assistants	5,504
Cleaners and domestics	3,810
Publicans and managers of licensed premises	3,436
Receptionists	3,087
Other occupations	28,457
Total hospitality	157,990

Source: SOLAS/SLMRU analysis of QNHS data and Indecon sectoral/occupational allocations analysis.

Note: Employment estimate is calculated based on SLMRU for Q1, Q2 and Q3 2014. The growth rate for employment in the AFS sector from CSO data has been applied to obtain an estimate of employment across occupations in Q4 2014 and an average across the four quarters taken.

Figure 2.4 provides an outline of the levels of employment in key hospitality-related occupations. In terms of numbers employed, the largest concentrations of employment are among waiters/waitresses (27,509 or 17.4% of the total in 2014), chefs (23,948 or 15.2%), kitchen/catering assistants (23,255 persons or 14.7%), bar staff (18,719 or 11.8%), and hotel and other accommodation managers and proprietors (8,242 or 5.2% of overall employment). These specific occupations together represented almost two-thirds (64.3%) of overall hospitality-related employment during 2014. These figures provide an indication of the existing concentrations of employment in hospitality-related occupations.

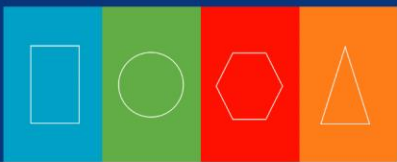
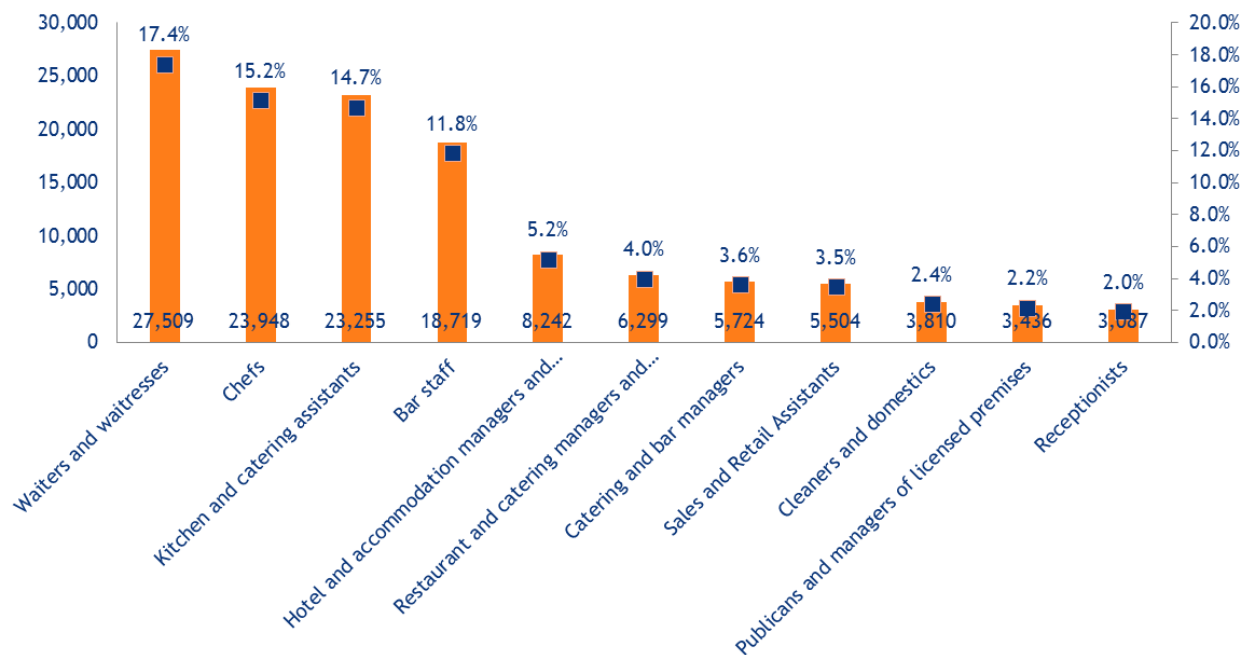


Figure 2.4: Employment in Key Hospitality-related Occupations - 2014



Note: Data based on average employment levels over Quarters 1-4 of 2014. Percentages provided relate to the proportion of employment in total Hospitality sector, including “other occupations” category (not shown in this chart).

Source: SOLAS/SLMRU analysis of QHNS data and Indecon sectoral/occupational allocation analysis.

2.3.3 Recent employment trends

It is also important in assessing skill requirements to consider recent trends in employment in the Hospitality sector. Figure 2.5 presents the recent trend in estimated overall Hospitality sector employment over the period 2008-2014, based on the application of the above definitional approach.

Overall employment totalled over 151,000 in 2008 but fell to 143,500 in 2011 as the economic recession impacted on consumer spending. There has since been a rebound in the sector as the wider Irish economy has recovered, and by the third quarter of 2014 overall employment in the Hospitality sector reached an estimated 160,400, representing an increase of approximately 12% on the level seen in the same quarter of 2011.

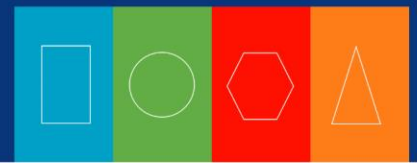
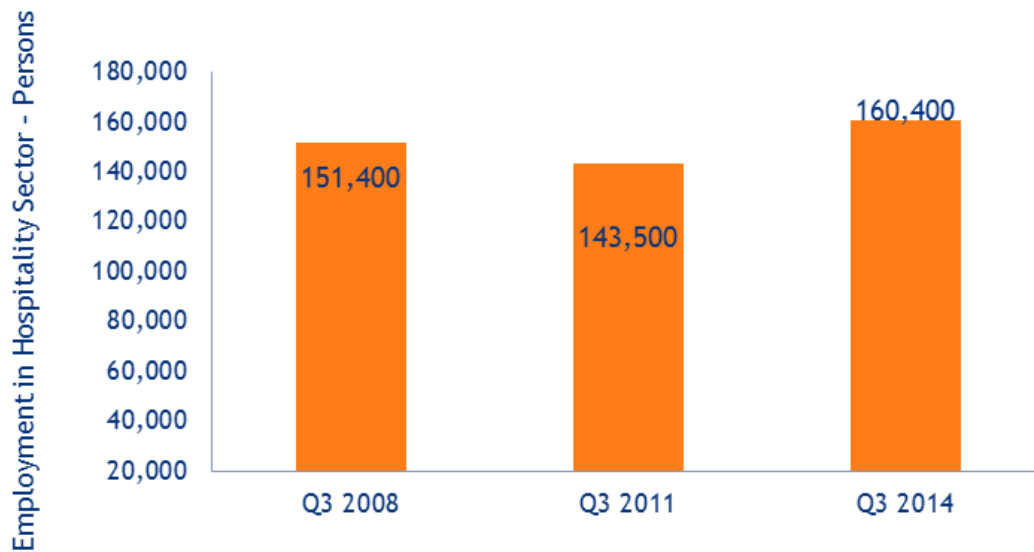


Figure 2.5: Recent Trends in Overall Employment in Hospitality Sector - 2008-2014



Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

Further detail in relation to the recent trends in employment at occupational level is provided in Table 2.4. During the period from 2011 to 2014, the greatest proportionate increases in employment were evident among waiting staff (49%) and hotel/accommodation managers and proprietors (48%). Significant increases in employment of chefs (29%) and sales/retail assistants (21%) are also observed. There were also declines in employment for publicans/managers of licensed premises (-41%), cleaners/domestics (-18%) and restaurant/catering managers and proprietors (-9%).

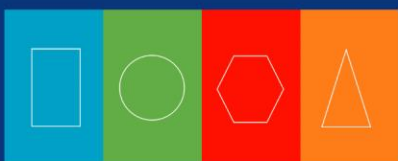


Table: 2.4: Recent Trends in Employment

Occupation	Q3 2008	Q3 2011	Q3 2014	% Change - 2011-2014
Waiters and waitresses	24,300	18,900	28,100	49%
Hotel and accommodation managers and proprietors	5,300	5,400	8,000	48%
Chefs	20,400	19,100	24,700	29%
Sales and Retail Assistants	4,800	4,300	5,200	21%
Other occupations	24,400	26,200	28,700	10%
Catering and bar managers	5,200	6,100	6,300	3%
Receptionists	3,500	3,000	3,100	3%
Kitchen and catering assistants	24,600	23,400	23,200	-1%
Bar staff	21,600	20,100	19,800	-1%
Restaurant and catering managers and proprietors	5,900	7,000	6,400	-9%
Cleaners and domestics	4,200	4,400	3,600	-18%
Publicans and managers of licensed premises	3,700	5,600	3,300	-41%
Housekeepers and related occupations	3,500	*	*	N/A
Total	151,400	143,500	160,400	12%

Notes: * indicates that the number of observations is too small to report.

Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

Gender breakdown of employment

An indication of the gender breakdown of employment in the Hospitality sector is provided by reference to the data on from the CSO's QNHS pertaining to the Accommodation and Food Services sector. The position in 2014 is summarised in Figure 2.6. This indicates that there are marginally more women employed in the sector than men.

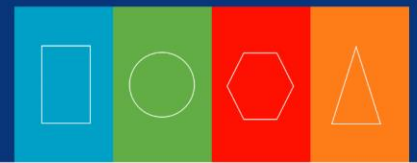
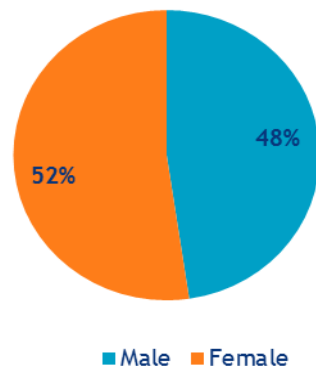


Figure 2.6: Gender Breakdown of Employment in the Hospitality Sector - Accommodation and Food Services - 2014



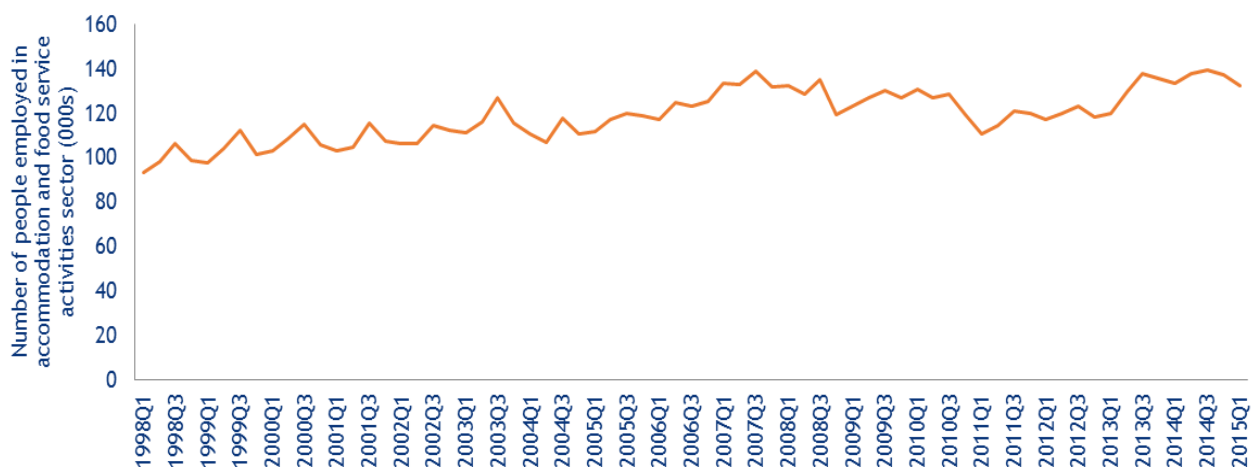
Data relates to position as at 2014 Q3.

Source: CSO, Quarterly National Household Survey.

2.3.4 Seasonal nature of employment

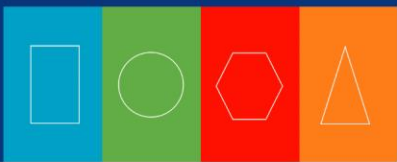
A feature of the Hospitality sector is the seasonal nature of employment, as evidenced in Figure 2.7 which describes the quarterly movements in employment in the key AFS component of the overall Hospitality sector over the period 1998-2015.⁴ The seasonal nature of employment is evident by the pattern of annual peaks in employment, which tend to occur in the third quarter of each year.

Figure 2.7: Seasonal Pattern of Employment in Accommodation and Food Services Sector - 1998-2015



Source: CSO, Quarterly National Household Survey.

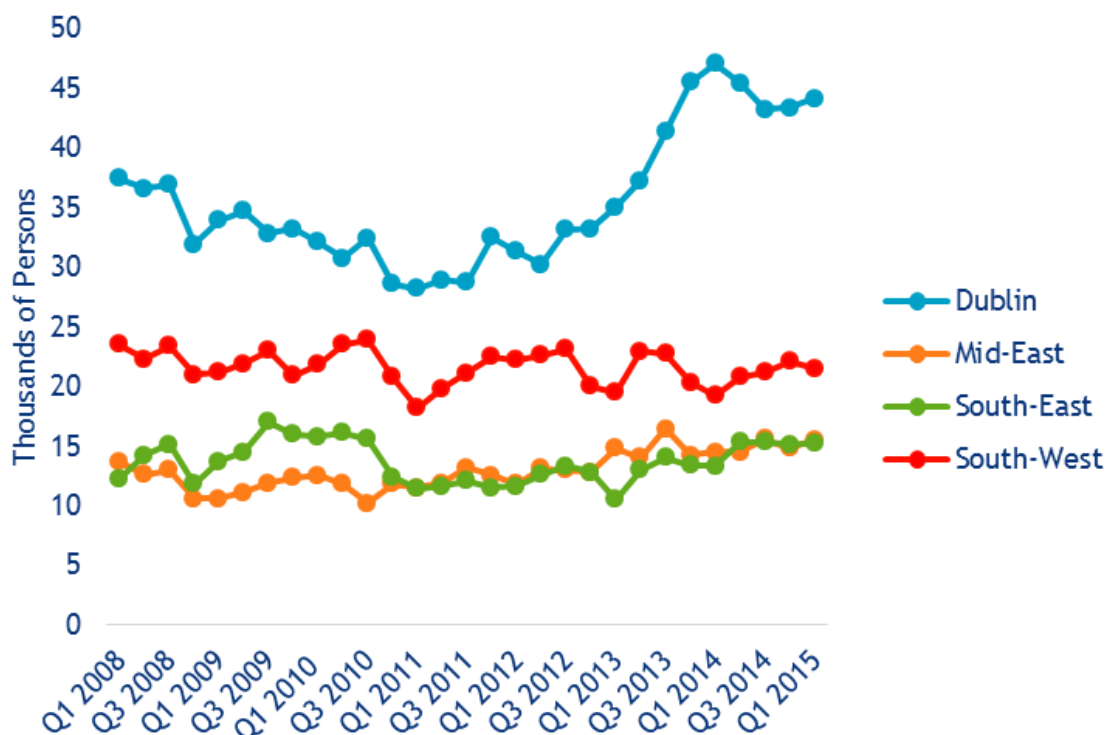
⁴ The accommodation and food services sector accounted for 87% of estimated employment in the hospitality sector in Q3 2014.



2.3.5 Regional employment trends

It is also informative to consider the recent developments on a geographic basis, by reference to regional employment patterns. While comprehensive data at a regional level for hospitality sector employment was not available on the same definitional basis as presented in the preceding analysis, data is available at a regional level for the Accommodation and Food Services sector. Figure 2.8 highlights the developments since 2008 in relation to AFS sector employment in the Dublin, South-West, Mid-East and South-East regions. Most notable from this data has been the divergence in employment conditions in Dublin compared to other regions, with employment in accommodation and food services in Dublin showing a much faster recovery since 2012.

Figure 2.8: Recent Trends in Hospitality-related Employment by Region - Accommodation and Food Services Sector Employment in Dublin, South West, Mid-East and South-East Regions



Source: CSO, Quarterly National Household Survey.

Figure 2.9 presents the developments in relation to employment over the period 2008-2015 in the accommodation and food services sector in the Border, Midland, West and Mid-West regions. The data reveals a very mixed picture in relation to employment developments, while there is also significant volatility over time. However, as in the case of the preceding figure, these regions have lagged Dublin and have not seen the same extent of recovery in employment conditions as the capital since 2012.

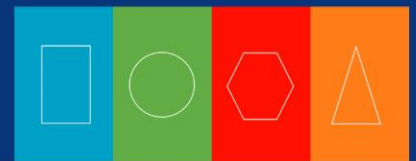
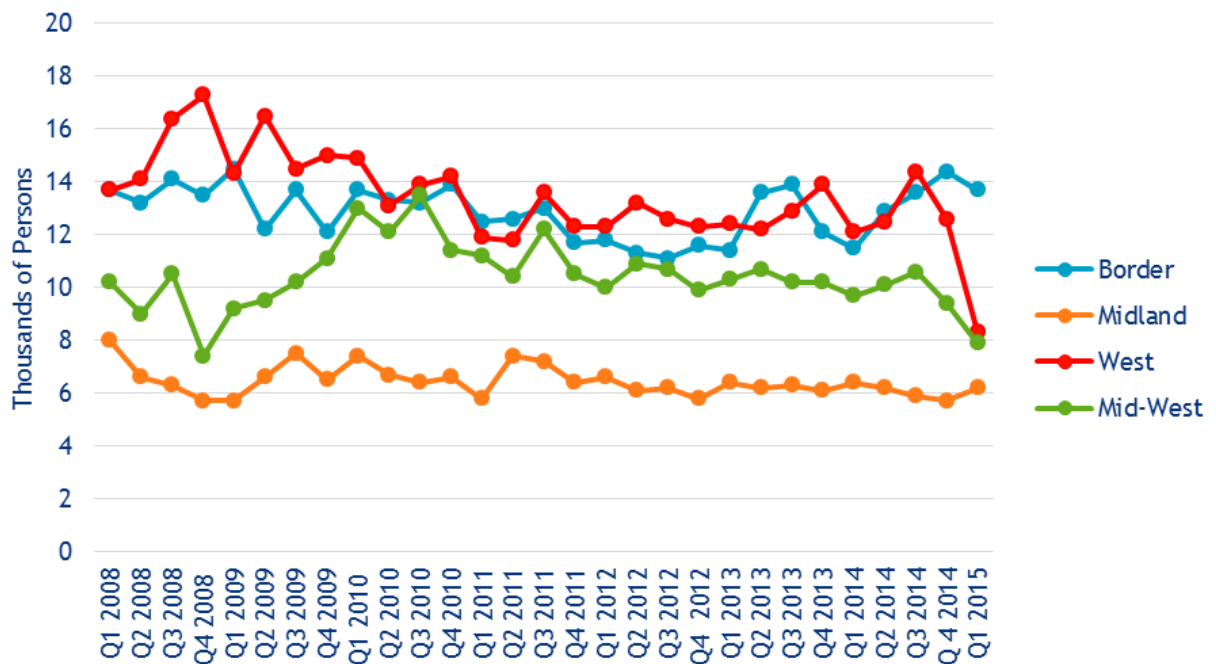


Figure 2.9: Recent Trends in Hospitality-related Employment by Region - Accommodation and Food Services Sector Employment - Border, Midland, West and Mid-West Regions



Source: CSO, Quarterly National Household Survey.

2.3.6 Employment status (full-time/part-time)

Table 2.5 provides a comparative indication of the employment status of persons working in the hospitality sector, by reference to the percentage of employment in the key Accommodation and Food Services sector component that relates to full-time versus part-time employment. It is notable that the accommodation and food services sector has the lowest proportion of full-time employees and the highest proportion of part-time workers across the sectors shown, with part-time employment accounting for 40% of total employment in the sector. By comparison, part-time employment accounted for 26.5% of employment across all services sectors and 23% across all economic sectors.

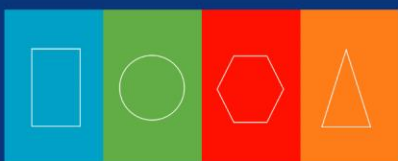


Table 2.5: % Full-Time and Part-Time Employment by Sector - Q4 2014

	<i>Employment - % Full-Time</i>	<i>Employment - % Part-Time</i>	<i>Total</i>
Information and communication	91.6%	8.4%	100%
Industry	91.4%	8.6%	100%
<i>Total Industry</i>	<i>88.7%</i>	<i>11.3%</i>	<i>100%</i>
Public administration and defence; compulsory social security	88.0%	12.0%	100%
Financial, insurance and real estate activities	87.7%	12.3%	100%
Professional, scientific and technical activities	86.5%	13.5%	100%
Agriculture, forestry and fishing	85.3%	14.7%	100%
Transportation and storage	83.9%	16.2%	100%
Construction	83.2%	16.8%	100%
<i>All Economic Sectors</i>	<i>77.0%</i>	<i>23.0%</i>	<i>100%</i>
Education	75.7%	24.3%	100%
<i>All Services Sectors</i>	<i>73.5%</i>	<i>26.5%</i>	<i>100%</i>
Human health and social work activities	67.1%	32.9%	100%
Administrative and support service activities	66.8%	33.2%	100%
Wholesale and retail trade; repair of motor vehicles and motorcycles	66.5%	33.5%	100%
<i>Accommodation and food service activities</i>	<i>60.0%</i>	<i>40.0%</i>	<i>100%</i>

Note: Percentages may not sum exactly to 100% due to rounding differences in underlying data.

Source: CSO, Quarterly National Household Survey.

Figure 2.10 depicts the recent trends in full-time and part-time employment in the Accommodation and Food Services sector over the period from 2008 to 2014. Over this period the proportion of people working in full-time jobs in the sector reached over two-thirds (66.8%) of the total in the third quarter of 2008. However, this proportion fell to 55.8% in the final quarter of 2012, when the proportion in part-time employment reached 44.2%. By the fourth quarter in 2014, the division between full-time and part-time employment stood at 60% versus 40%. This compares with a 77% to 23% ratio across all sectors of the Irish economy, emphasising the relative importance of part-time employment in the Hospitality sector.

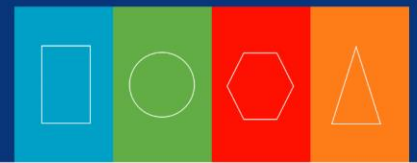
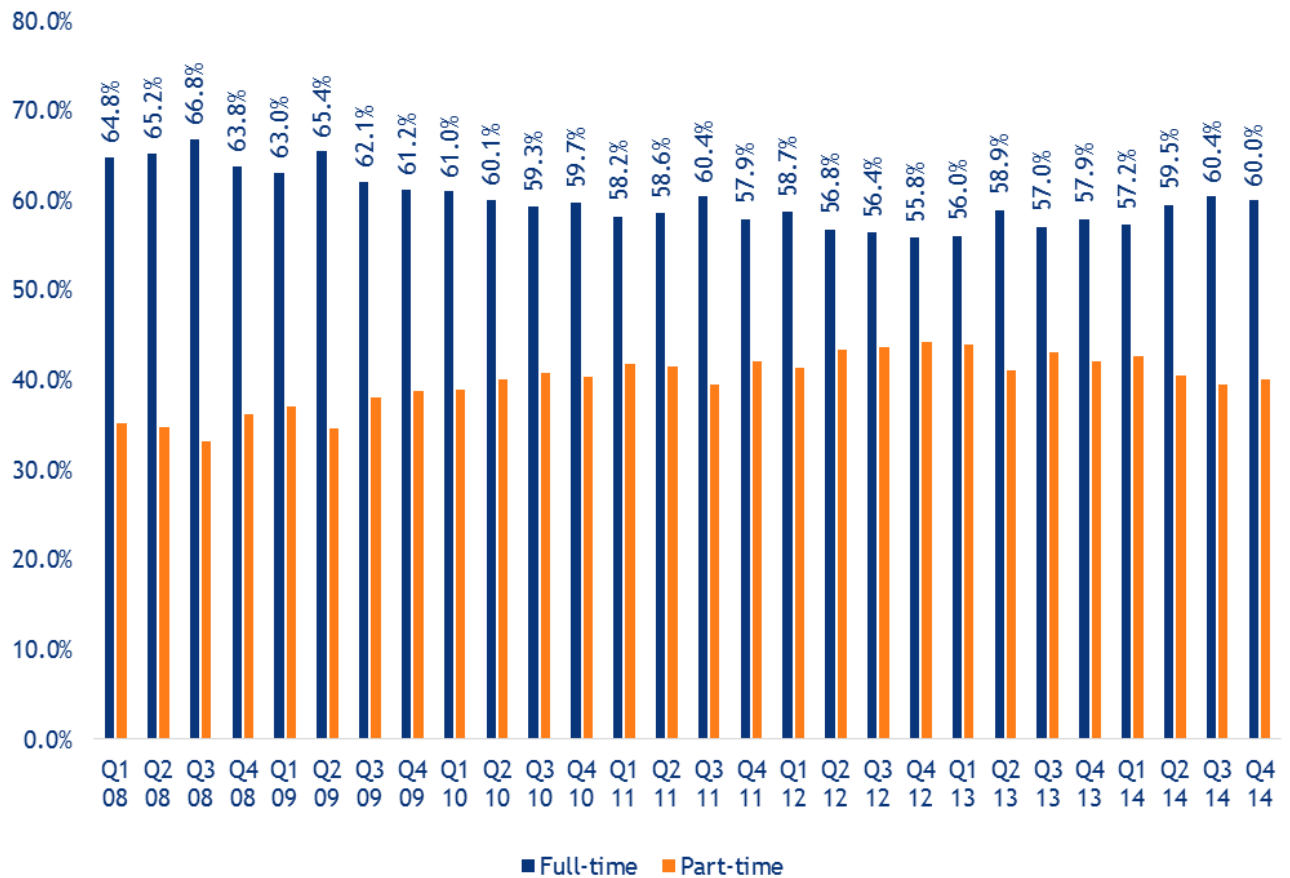


Figure 2.10: Recent Trends in Full-Time/Part-Time Employment - Accommodation and Food Services Sector - 2008-2014



Source: CSO, Quarterly National Household Survey.

It is also illustrative to consider a more detailed analysis of the breakdown between part-time and full-time employment in the Hospitality sector by occupation. Based on aggregation of detailed QNHS data provided by the SOLAS SLMRU, the analysis presented in Table 2.6 indicates that over half of all waiting staff, bar staff and sales/retail assistants, and 69% of cleaners/domestics, are employed on a part-time basis.

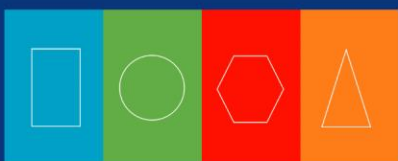


Table 2.6: Estimates of Part-Time Employment in Hospitality Sector by Occupation - 2014

	<i>% Part-Time Employment</i>
Cleaners and domestics	69%
Waiters and waitresses	57%
Bar staff	56%
Sales and retail assistants	53%
Kitchen and catering assistants	45%
Receptionists	31%
Hotel and accommodation managers and proprietors	18%
Chefs	18%
Catering and bar managers	17%
Publicans and managers of licensed premises	10%
Restaurant and catering managers and proprietors	8%
Housekeepers and related occupations	**
Total Hospitality Sector	39%

Note: 2014 figures based on position as at Quarter 3 of that year.

*** indicates that the number of observations is too small to report*

Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

2.3.7 Under-employment

Due to the relatively high proportion of part-time employment, it is important to assess whether significant 'under-employment' may be present in the Hospitality sector. Under-employment relates to individuals who are employed on a part-time basis but who would be both willing and able to work additional hours. The estimates presented in Table 2.7 are based on data provided by the SOLAS SLMRU and indicate that about 20% of bar staff and sales/retail assistants are under-employed, while about 19% of cleaners/domestics and approximately 15% of waiting staff are under-employed. These figures suggest that there may be potential scope to address future expansion in skills demand through addressing under-employment of existing staff in the sector.

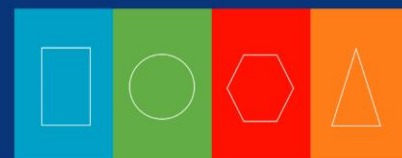


Table 2.7: Estimates of ‘Under-employment’ in Hospitality Sector by Occupation - 2014

	<i>% part-time Under-employment</i>
Bar staff	20%
Sales and Retail Assistants	20%
Cleaners and domestics	19%
Waiters and waitresses	15%
Receptionists	13%
Kitchen and catering assistants	11%
Chefs	5%
Catering and bar managers	4%
Hotel and accommodation managers and proprietors	3%
Restaurant and catering managers and proprietors	1%
Publicans and managers of licensed premises	0%
Housekeepers and related occupations	**

Note: The calculation of part-time uses the following criteria to derive underemployment:

1. Working part-time
2. Willing to work additional hours
3. Available to work additional hours

Note: 2014 figures based on position as at Quarter 3 of that year.

*** indicates that the number of observations is too small to report.*

Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

2.3.8 Nationality of persons working in the Hospitality sector

Another feature of the Hospitality sector concerns the mobility of labour and skills across international borders. This applies in particular within the EU and EEA areas, where labour can move freely within these areas. It also applies, though to a lesser degree, in the case of migration from non-EU/EEA areas. A broad indication of the origin and nationality of individuals working in the hospitality sector in Ireland is provided by Figure 2.11, which shows the proportionate breakdown of employment in the key accommodation and food services component of the Hospitality sector in 2014, based on data from the CSO’s Quarterly National Household Survey. The chart indicates that two-thirds (67%) of the workforce in the Accommodation and Food Services sub-sector is comprised of Irish nationals, while one-third relates to other EU or non-EU nationals. There is a broad 50:50 division between EU and non-EU nationals within the non-Irish component. Data was not available to enable a more detailed identification of non-EU nationals or EEA nationals.

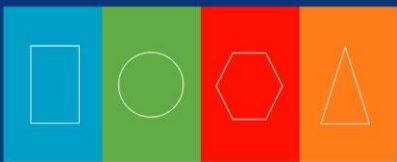
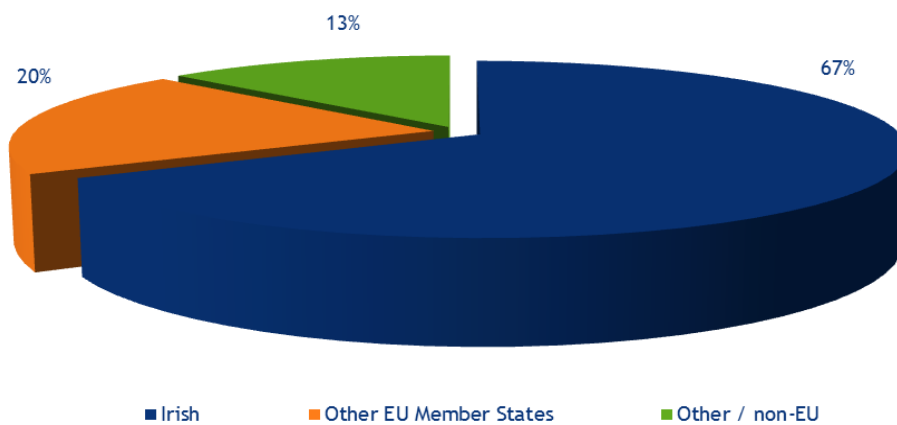


Figure 2.11: Percentage Breakdown of Employment by Nationality - Accommodation and Food Services Sector - 2014



Note: 2014 figures based on position as at Quarter 3 of that year.

*** 'Other nationalities' refers to European (non-EU), African, Asian, American, and other nationalities*

Source: CSO, Quarterly National Household Survey.

A more detailed analysis of the nationality of employment across the Hospitality sector as a whole on a detailed occupational basis is presented in Table 2.8, based on data provided to Indecon by SOLAS/SLMRU. Overall, the Hospitality sector employs Irish nationals in 69% of its jobs. Occupations with the highest percentage of Irish nationals included publicans/managers of licensed premises (94%), catering and bar managers (92%), hotel/accommodation managers and proprietors (81%), and bar staff (81%). Waiting staff, chefs and restaurant/catering managers and proprietors were comprised of 68%, 56%, and 65% Irish employees, respectively. The occupation with the lowest percentage of Irish nationals was cleaners and domestics, at 33%.

It is noteworthy that the proportion of non-Irish nationals working in the Hospitality sector is more than twice the proportion across the Irish economy as a whole (14.7% in 2014 Q3). The greater role played by non-Irish national's signals the importance of factoring migration into the assessment of possible sources of future skills supply in the Irish Hospitality sector.

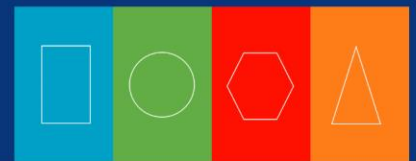


Table 2.8: Estimates of Nationality in Hospitality Sector by Occupation - 2014

	% Irish	% Other EU	% Non-EU / Other
Chefs	56%	25%	19%
Restaurant and catering managers & proprietors	65%	18%	17%
Waiters and waitresses	68%	17%	15%
Sales and Retail Assistants	66%	20%	14%
Bar staff	81%	9%	10%
Kitchen and catering assistants	65%	26%	10%
Publicans and managers of licensed premises	94%	0%	6%
Cleaners and domestics	33%	62%	5%
Receptionists	77%	20%	4%
Catering and bar managers	92%	6%	2%
Hotel & accommodation managers & proprietors	81%	19%	0%
Housekeepers and related occupations	**	**	**
Total Hospitality	69%	20%	12%

*2014 figures based on position as at Quarter 3 of that year.

** indicates that the number of observations is too small to report.

Percentages may not sum exactly to 100% due to rounding differences in underlying data.

Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

2.3.9 Age profile of employment

Figure 2.12 outlines the age profile of employees in the Hospitality sector. This shows that 67% of employment in this sector is comprised of people aged 25-54, which compares 75% in this age group across the Irish economy as a whole, with people aged under 25 making up 22% of employees, compared to 8 % in the wider economy.

The reverse applies in the higher age category, 55+ years - only 10% of those employed in the Hospitality sector are aged 55 and over, compared with 16% in the wider economy. This may also signal a potential to increase the proportion of workers in the older age brackets in the future, as a source of new skills supply.

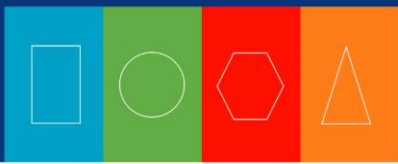
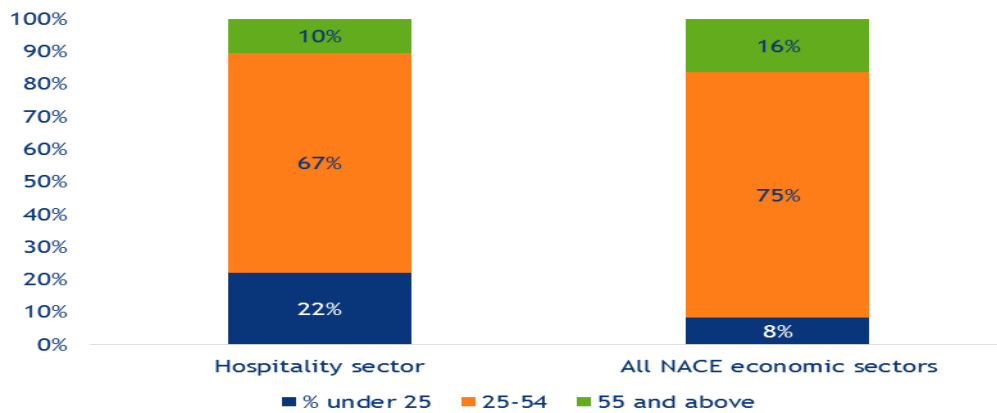


Figure 2.12: Age Profile of Employees in Hospitality Sector versus All NACE Economic Sectors - 2014



Note: 2014 figures based on position as at Quarter 3 of that year. Percentages may not sum exactly to 100% due to rounding differences in underlying data.

Source: SOLAS/SLMRU analysis of data from Quarterly National Household Survey and Indecon sectoral/occupational allocations.

2.3.10 Unemployment among Hospitality sector workers

Table 2.9 considers the number of unemployed persons registered with IINTREO Employment Services in terms of their declared skill level who have indicated a preference for a hospitality-related occupation. There are significant numbers of skilled persons on the Live Register who are seeking employment in hospitality occupations, representing a potential skills pool. These individuals may need support to return to work. Of particular note is the high number of unemployed persons who have indicated that they are fully trained or have some knowledge and expertise with preferred occupations of cleaner, barperson, chef, catering assistant, waiter/waitress and kitchen porter.

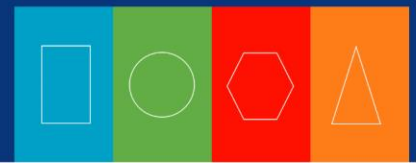


Table 2.9: Unemployed Persons on Live Register Registered with Intreo Employment Services by Selected Major Hospitality-related Occupations/ Job Preference

Occupation Choice/Preference	Skill Level Declared			
	None or Skill Not Known	Some Knowledge /Expertise	Fully Trained	Fully Trained + Some Knowledge/Expertise
Cleaner/Janitor	1,321	1,551	2,642	4,193
Barpersons	701	1,026	2,344	3,370
Chefs	458	612	1,898	2,510
Assistant-catering	603	753	1,359	2,112
Waiter / Waitress	431	639	1,296	1,935
Kitchen porter	292	495	811	1,306
Receptionist - hotel	204	223	282	505
Porter - hotel	74	101	197	298
Manager - restaurant	20	42	231	273
Manager - hotel/guest house	37	44	156	200
Manager - catering contract	9	20	122	142
Manager - catering hotel	15	19	116	135

Note: Data is based on clients on Jobseekers Allowance, Benefit or Credits, and reflects occupational coding assigned when registering for employment services support based on first choice/preference for an occupation with stated level of skill captured where provided.

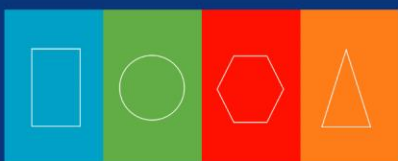
Source: Department of Social Protection (DSP)

Table 2.10 presents a closer look at unemployed persons registered with INTREO who have stated a preference for a chef occupation. The number of individuals stating a preference for occupation as a chef decreases as the seniority of the position increases.

Table 2.10: Unemployed Persons on Live Register Registered with Intreo Employment Services with Chef Occupation Choice/Preference

	Skill Level Declared			
	None or Skill Not Known	Some Knowledge / Expertise	Fully Trained	Fully Trained + Some Knowledge/Expertise
Chef	273	356	1,386	1,742
Chef commis	158	216	227	443
Chef de partie	7	20	128	148
Chef de cuisine/ sous chef	17	17	89	106
Chef - head catering.	3	3	68	71

Source: Department of Social Protection



2.3.11 Earnings Trends

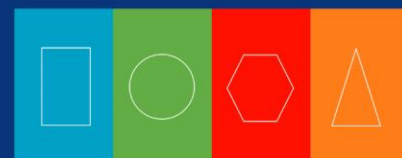
Table 2.11 presents average hourly earnings by detailed sector across the economy for Q4 2014.

Table 2.11: Average Hourly Earnings by Sector (€) Q4 2014

2014 Q4	
Financial and insurance service activities	34.55
Education	34.37
Publishing activities	31.28
Basic pharmaceutical products and preparations	29.83
Telecommunications	29.07
Computer programming, consultancy and Information service activities	28.37
Petroleum and chemical products	28.09
Electricity, gas, steam, water supply; sewerage, waste activities	27.62
Air transport	25.83
Computer, electronic and optical products	25.52
Public administration and defence; compulsory social security	25.50
Architectural and engineering activities; technical testing and analysis	25.35
Human health activities	25.04
Warehousing and support activities for transportation	24.59
Legal and accounting activities	23.84
Scientific research & development; advertising, other professional, scientific, activities	23.81
Wholesale trade	22.50
Construction of buildings	21.83
Electrical equipment	21.37
Civil engineering	20.55
Food products, beverages and tobacco	20.32
Sports activities and amusement and recreation activities	18.60
Office administrative, office support and other business support activities	18.33
Residential care activities	17.77
Social work activities without accommodation	17.59
Arts, entertainment and cultural activities	17.26
Travel agency, tour operator and other reservation service and related activities	16.80
Security and investigation activities	14.61
Retail trade	14.54
Accommodation	13.02
Services to buildings and landscape activities	12.98
Repair of computers, personal and household goods; other personal service activities	12.78
Food and beverage service activities	12.11

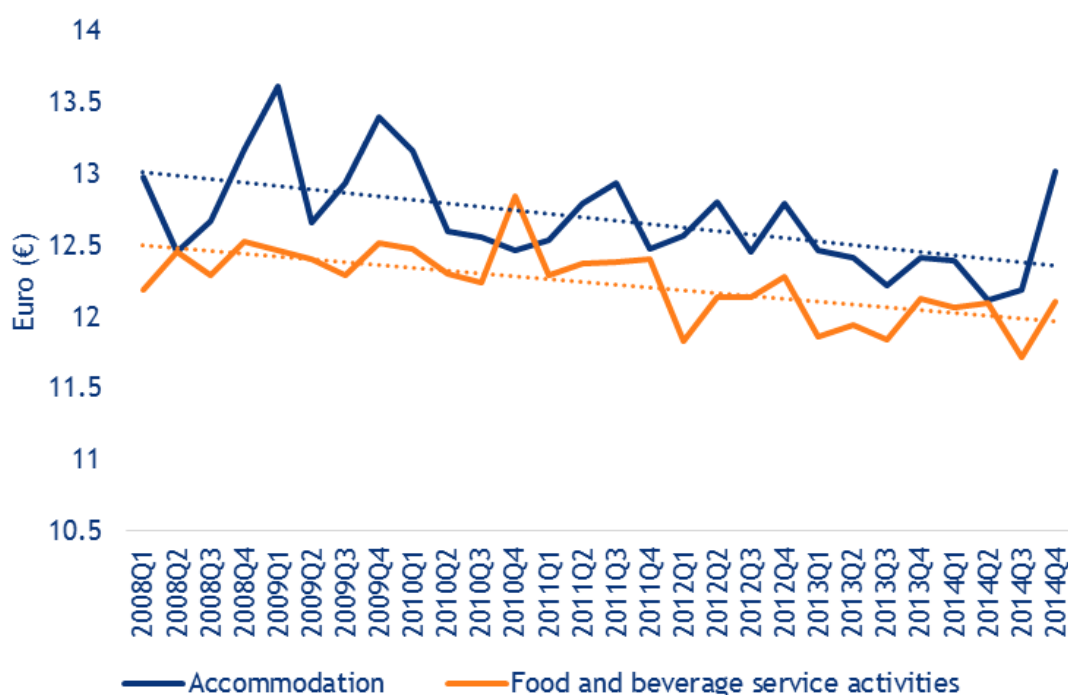
Note: *n.e.c.* signifies not elsewhere classified.

Source: Indecon analysis of CSO Earnings, Hours and Employment Costs Survey (EHECS)



Hourly pay rates are studied because of the higher proportion of part-time, casual and seasonal work done in the accommodation and food services sector than in any other sector. Accommodation and food service activities represented some of the lowest hourly earnings in Q4 2014, with an average hourly wage of €13.02 for the accommodation sector. Average hourly earnings of €12.11 in the food and beverage services sector were lowest of all NACE economic sectors. It should however be noted that this data is exclusive of tips which employees in the Hospitality sector often receive in addition to their hourly rate, particularly those involved in food and beverage service activities. Reliable data on the extent of tipping is unavailable as many food and beverage outlets leave cash tips to be managed and disbursed by the staff themselves. Figure 2.13 shows that average hourly earnings declined in both the Accommodation and the Food and Beverage Services activities from 2008 to 2014. Accommodation sector wages were slightly higher during most of the period.

Figure 2.13: Average Hourly Earnings, Accommodation & Food and Beverage Activities 2008-2014

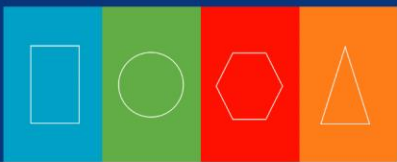


Note: Linear trend lines have been fitted to the data and the equations included above.

Source: Indecon analysis of CSO Earnings, Hours and Employment Costs Survey

2.3.12 Turnover and Replacement

In the context of this analysis, turnover and replacement data for hospitality-related occupations are important for the purposes of considering various strategies with regards to education, training, hiring and employee retention. The high proportion of part-time, casual and seasonal workers, especially students who repeatedly exit and re-enter the workforce from inactivity has a significant bearing on the extent of skills shortages in and policy decisions for the sector.



Replacement Rate

The replacement rate is defined in the National Skills Bulletin 2015: “*The replacement rate is based on the number of identified transitions from employment to inactivity (e.g., retirement, home duties, study, etc.) and net losses from inter-occupational movements.*”

It is important to consider historical replacement rates in the Hospitality sector as these have implications for the demand scenarios where the overall demand for hospitality-related skills, must also take account of how many employees will be needed to replace employees exiting the workforce or occupation, as well as any projected growth in employment. Table 2.12 presents the data on replacement rates for hospitality-related occupations.

Table 2.12: Replacement Rates for Hospitality-Related Occupations

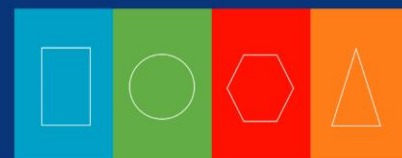
	2012	2013	2014
Waiters and waitresses	26%	19%	25%
Bar staff	33%	18%	20%
Kitchen and catering assistants	12%	17%	17%
Catering and bar managers	*	*	16%
Receptionists	18%	10%	15%
Restaurant managers	*	*	15%
Sales assistants	16%	15%	13%
Housekeepers & caretakers etc.	*	8%	13%
Elementary cleaning occupations	8%	12%	11%
Publicans	*	*	10%
Hotel and accommodation managers	*	*	7%
Chefs and cooks	8%	*	4%

Note: The replacement rate is calculated by SLMRU based on the number of identified transitions from employment to inactivity (e.g. retirement, home duties, study, etc.) and net exits due to inter-occupational movements. As such, replacement rates exclude casual staff who exit and re-enter employment on a seasonal basis.

**Denotes instances where the number of observations is too small to report.*

Source: National Skills Bulletin 2013, 2014 and 2015

The national average replacement rate across all occupations was 7% and thus the replacement rate in hospitality-related occupations was above average in all but two occupations. In all three years, waiting staff and bar staff replacement rates showed the highest rates of all the occupations where data was published. The percentages fell significantly for both occupations in 2013 but rose again to 25% and 20%, respectively, in 2014. The same trend applied to receptionists and housekeepers and caretakers. Most replacement rates for the other listed occupations varied in the range 11% to 17% in 2014. The notable exception to these high percentages is for chefs and cooks: their replacement rate dropped from an already low 8% in 2012 to 4% in 2014. This indicates that chefs are less likely to exit their occupation, which is interesting in the context of the often-encountered difficulty to recruit suitably qualified chefs reported by many employers during the consultations for this



assessment. Only hotel and accommodation managers show a replacement rate (7%) in 2014 that approaches the 4% for chefs and cooks. These low rates highlight the stark contrast between chefs and cooks on the one hand, and waiters, waitresses and bar staff on the other.

Turnover

The National Skills Bulletin also provides details on the turnover rate, which is calculated by the SLMRU based on the number of identified intra-occupational transitions (changes of employer) and the neutral inter-occupational movements (transitions between occupations where exits from an occupation were compensated in full by entries to that occupation). The turnover rate is also referred to as ‘churn’. The turnover rate refers to the number of individuals changing job within an occupation and high turnover rates may suggest a need to consider retention schemes. Data for 2012 to 2014 were obtained from the National Skills Bulletin and indicate that waiting staff consistently had the highest rates of turnover at 22% and 20%, respectively (Table 2.13). The national average turnover rate across all occupations was 13% in 2014. A number of occupations experience above-average turnover rates, namely: waiters and waitresses, bar staff, kitchen and catering assistants, receptionists and sales assistants. However, other hospitality-related occupations experience below-average turnover rates. In particular, publicans, hotel and accommodation managers and restaurant managers demonstrate very low turnover rates. Turnover rates for chefs have declined across 2012 to 2014 and are below average in 2014.

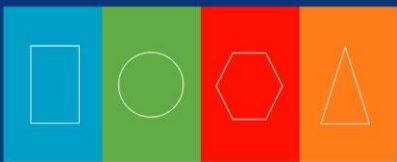
Table 2.13: Turnover Rate for Hospitality related Occupations

	2012	2013	2014
Waiters and waitresses	22%	20%	26%
Bar staff	12%	19%	19%
Kitchen and catering assistants	16%	14%	18%
Receptionists	15%	11%	18%
Sales assistants	16%	15%	17%
Catering and bar managers	*	*	12%
Elementary cleaning occupations	8%	7%	11%
Chefs and cooks	15%	12%	10%
Housekeepers & caretakers etc.	*	8%	9%
Restaurant managers	28%	*	7%
Hotel and accommodation managers	*	*	1%
Publicans	*	*	0%

Note: Turnover rate is calculated by SLMRU based on the number of identified intra-occupational transitions (changes of employer) and the neutral inter-occupational movements (transitions between occupations where exits from an occupation were compensated in full by entries to that occupation)

**Denotes instances where the number of observations is too small to report.*

Source: National Skills Bulletin 2013, 2014 and 2015



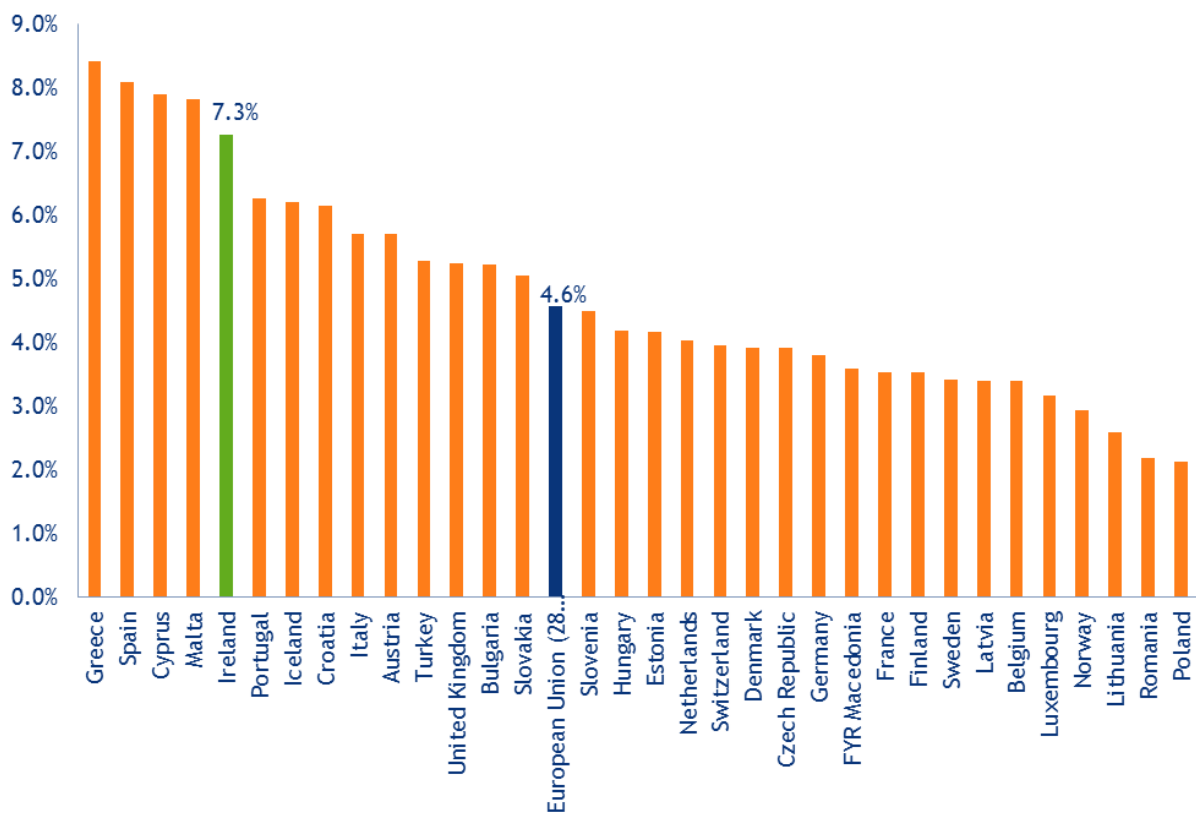
2.4 Comparative Features of Irish Hospitality Sector

It is also instructive to highlight specific features of the Hospitality sector in an international context. In this section, selected comparative data is presented on the key Accommodation and Food Services (AFS) component of the Hospitality sector, using data provided by Eurostat.

Relative importance of Hospitality Sector in the economy

An indication of the relative sectoral importance of the Hospitality sector can be seen by reference to the extent of employment in the sector relative to overall employment across the economy. In 2014, Ireland ranked 5th in the EU for employment in the accommodation and food services sector as a percentage of economy-wide employment (Figure 2.14). Greece ranked highest with 8.4% while Ireland had 7.3% of its workforce employed in the AFS sector. The average for the EU was 4.6%. These numbers indicate the relative importance of the AFS sector to overall employment in Ireland, only exceeded in Greece, Spain, Cyprus and Malta.

Figure 2.14: Employment in AFS Sector as % of Economy-Wide Employment 2014



Note: Persons in employment aged 15-64.
Source: Indecon analysis of Eurostat data.

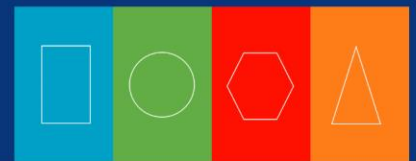
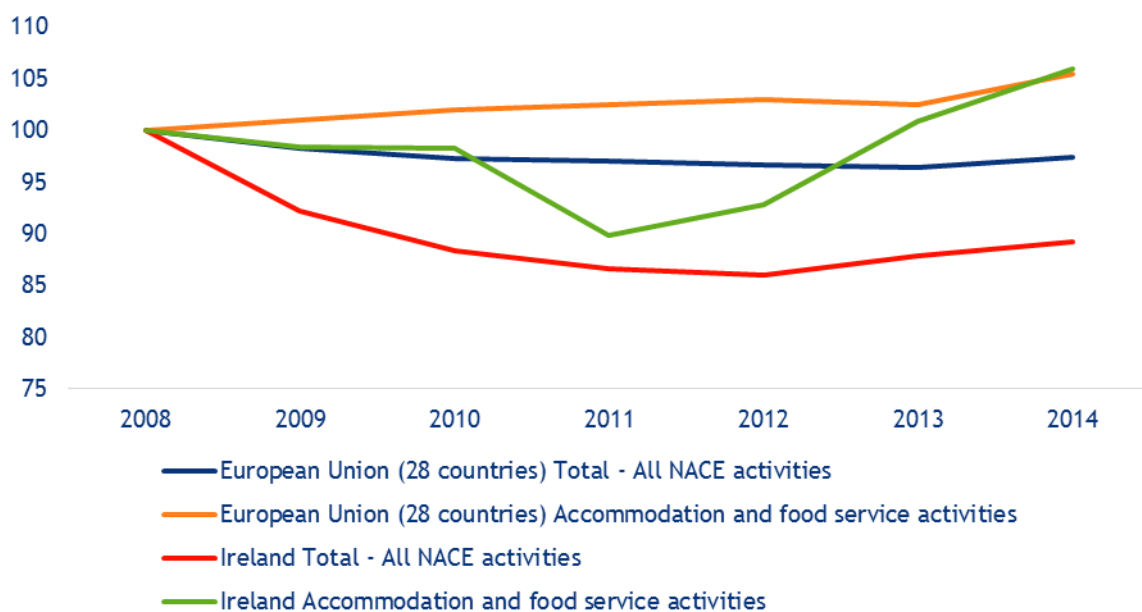


Figure 2.15 considers growth in AFS and total employment from 2008 to 2014 for both the EU-28 and Ireland. It is clear that employment in Ireland for all NACE activities declined more rapidly than the EU average during the period to 2012, but began to grow again in 2013, a year before the EU average turned upward. The EU average employment in the AFS sector increased between 2008 and 2014. By contrast, the Irish AFS sector exhibited decline from 2008 to 2011, but since 2012 the Irish AFS figures have risen significantly and for 2014 show that employment growth in the AFS sector in Ireland has caught up with the EU average, indexed from 2008. This is particularly interesting in light of the fact that the overall employment growth figures for 2014 still show a large gap between Ireland and the EU average.

Figure 2.15: Growth in AFS and Total Employment, EU-28 and Ireland 2008-2014



Note: Series indexed to 100 in 2008. Persons in employment aged 15-64.
 Source: Indecon analysis of Eurostat data.

Eurostat data on full- and part-time employment for Q4 2014 shows that the EU-28 had 80% full-time employees across all NACE categories, while Ireland showed a slightly lower figure for full-time employees at 77% for all NACE categories. The AFS sector demonstrates a larger percentage of part-time employees: 33% of EU-28 employees in the AFS sector were part-time; 40% of employees in the Irish AFS sector were part-time. These figures are significant to note for purposes of education, training, and retention strategies because part-time employees may have different skill levels, career aspirations and incentives than full-time employees in the AFS sector.

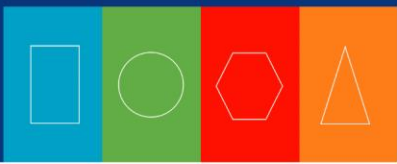
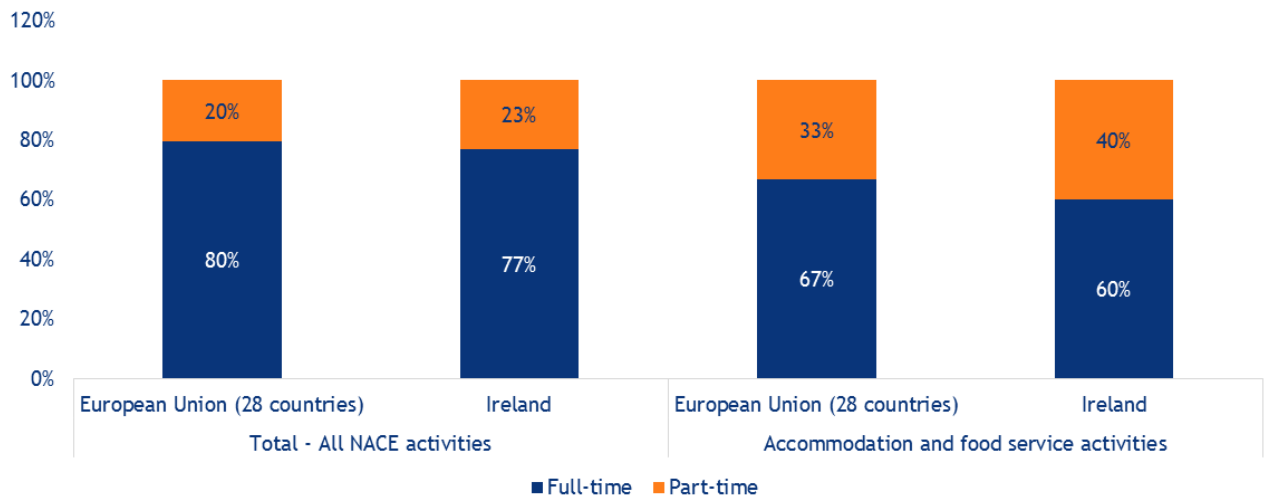


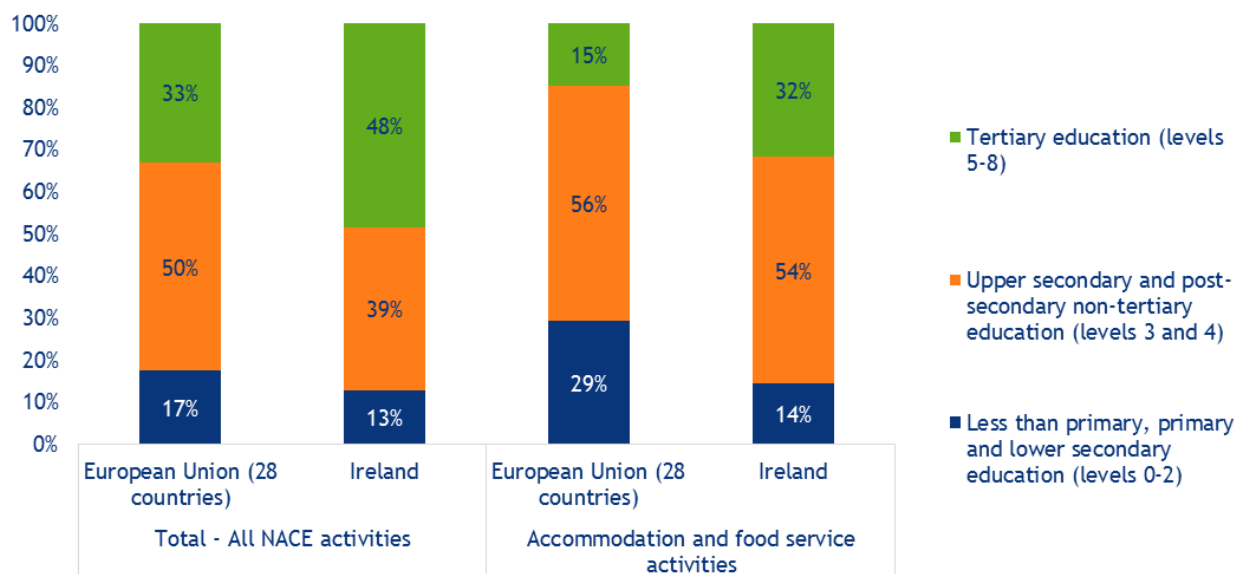
Figure 2.16: Full-Time and Part-Time Employment, EU-28 and Ireland Q4 2014



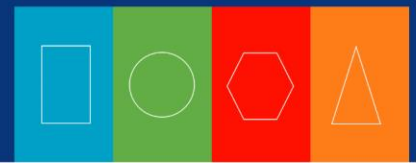
Note: Persons in employment aged 15-64.
Source: Indecon analysis of Eurostat data.

Figure 2.17 compares educational attainment levels in the EU-28 and Ireland for all NACE categories and for the AFS sector. This is instructive for the purposes of further analysing educational and training needs specific to the sector. Across all NACE categories, Ireland (48%) had a higher percentage than the EU-28 (33%) of employees who have attained at least some third-level education. Similarly, in the AFS sector, 32% of employees in Ireland demonstrated at least some third-level education, while figures for the EU-28 were a much lower 15%. This feature is important for educational, training, and retention initiatives in the sector.

Figure 2.17: Employees by Educational Attainment Level and Sector, EU-28 and Ireland 2014



Note: Persons in employment aged 15-64.
Source: Indecon analysis of Eurostat data.



Indeed, Table 2.14 shows that Ireland (at 32%) has an AFS workforce with the highest percentage of employees with third-level education. Notably, Spain is at 22.4%, the UK 21.5%, France 15.7%, the Netherlands 10.2%, Germany 8.0% and Italy 6.9%. It is instructive to note that several countries with significant tourism sectors have their dominant educational attainment levels for the AFS sector at upper secondary/post-secondary level above the Irish 53.9% figure, e.g., Czech Republic (87.2%), Finland (65.5%), Austria (58.1%), and the UK (57.2%). It is likely that the high proportions of third-level education among AFS sector employees in Ireland when compared to other EU countries can be explained partly by the limited availability of relevant hospitality-related courses at NFQ Level 5 and a lack of apprenticeships⁵ focussing directly on the sector.

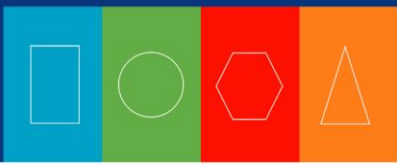
Table 2.14: Employees by Educational Attainment, AFS Sector 2014

	<i>% with less than primary, primary and lower secondary education (levels 0-2)</i>	<i>% with upper secondary and post-secondary non-tertiary education (levels 3 and 4)</i>	<i>% with tertiary education (levels 5-8)</i>
Ireland	14.3	53.9	31.8
Lithuania	2.2	69.3	28.5
Cyprus	20.5	51.3	28.2
Spain	48.8	28.8	22.4
United Kingdom	21.2	57.2	21.5
Norway	33.9	44.7	21.4
Belgium	29.7	54.0	16.3
Switzerland	29.9	54.0	16.1
France	26.0	58.3	15.7
Austria	26.9	58.1	15.0
<i>EU (28 countries)</i>	<i>29.1</i>	<i>56.1</i>	<i>14.8</i>
Finland	20.2	65.5	14.3
Greece	27.7	58.2	14.1
Sweden	31.9	54.3	13.8
Netherlands	39.6	50.2	10.2
Malta	50.4	39.8	9.8
Portugal	58.7	31.5	9.7
Denmark	41.5	50.2	8.3
Germany	29.0	62.9	8.0
Italy	40.3	52.8	6.9

Note: Employees Aged 15-64. Percentages may not sum exactly to 100% due to rounding differences in underlying data.

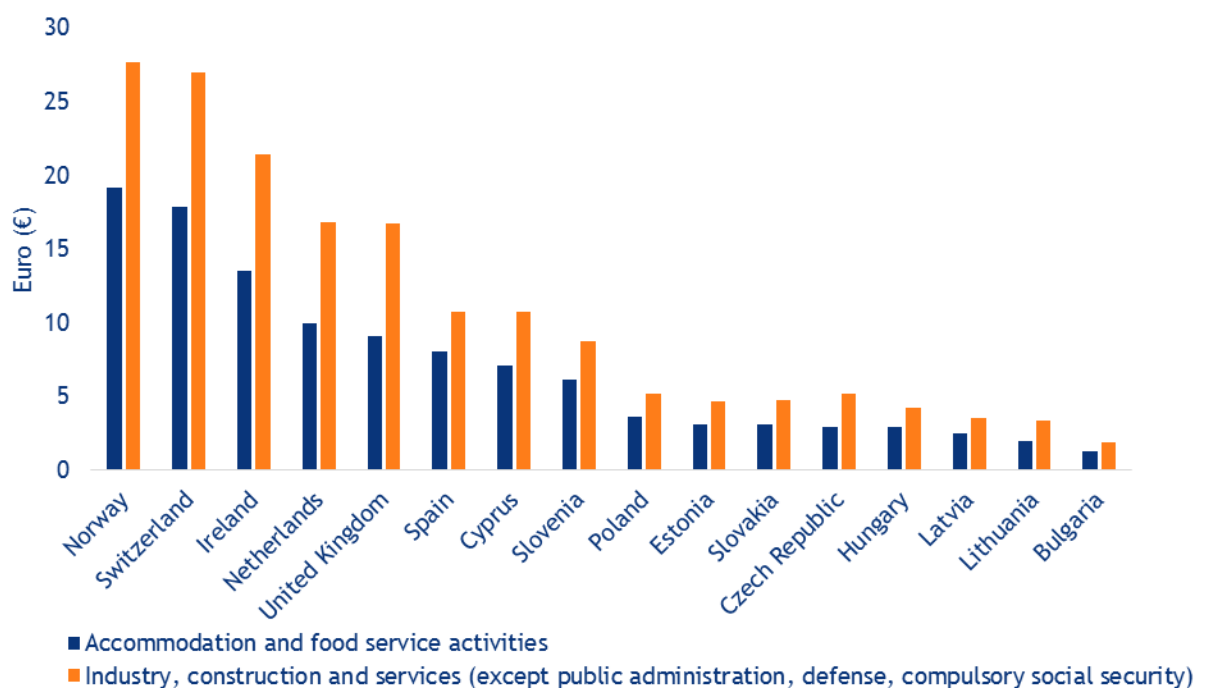
Source: Indecon analysis of Eurostat data.

⁵ There have been recent efforts to introduce a number of hospitality-related apprenticeships in Ireland.



Additional data relevant to the analysis includes wage information for both the AFS sector and the industry/construction/services sector. The latest country comparison Eurostat data (2010) presented in Figure 2.18, indicates that mean hourly earnings across the EU were generally lower for the AFS sector than for the industry/construction/services sector. Ireland is ranked third among the selected countries in both sectors, after Norway and Switzerland, with hourly earnings at about €13 in the AFS sector, and €21 in the industry/construction/services sector.

Figure 2.18: Mean Hourly Earnings for Selected Countries, 2010



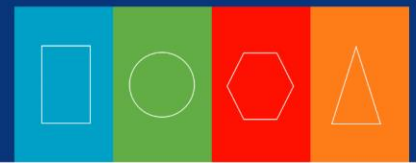
Source: Indecon analysis of Eurostat data.

2.5 Overview of Business and Skills Demand Trends in Hospitality Sector

This section presents an overview of domestic and international developments and trends in the sector, that are likely to influence the demand for hospitality-related skills. Recent trends in the value of the accommodation and food service activities sector are considered, as well as international and Irish developments in the tourism sector. Demographic, technological and marketing trends and innovations are considered that are likely to impact on skills demand in the Hospitality sector.

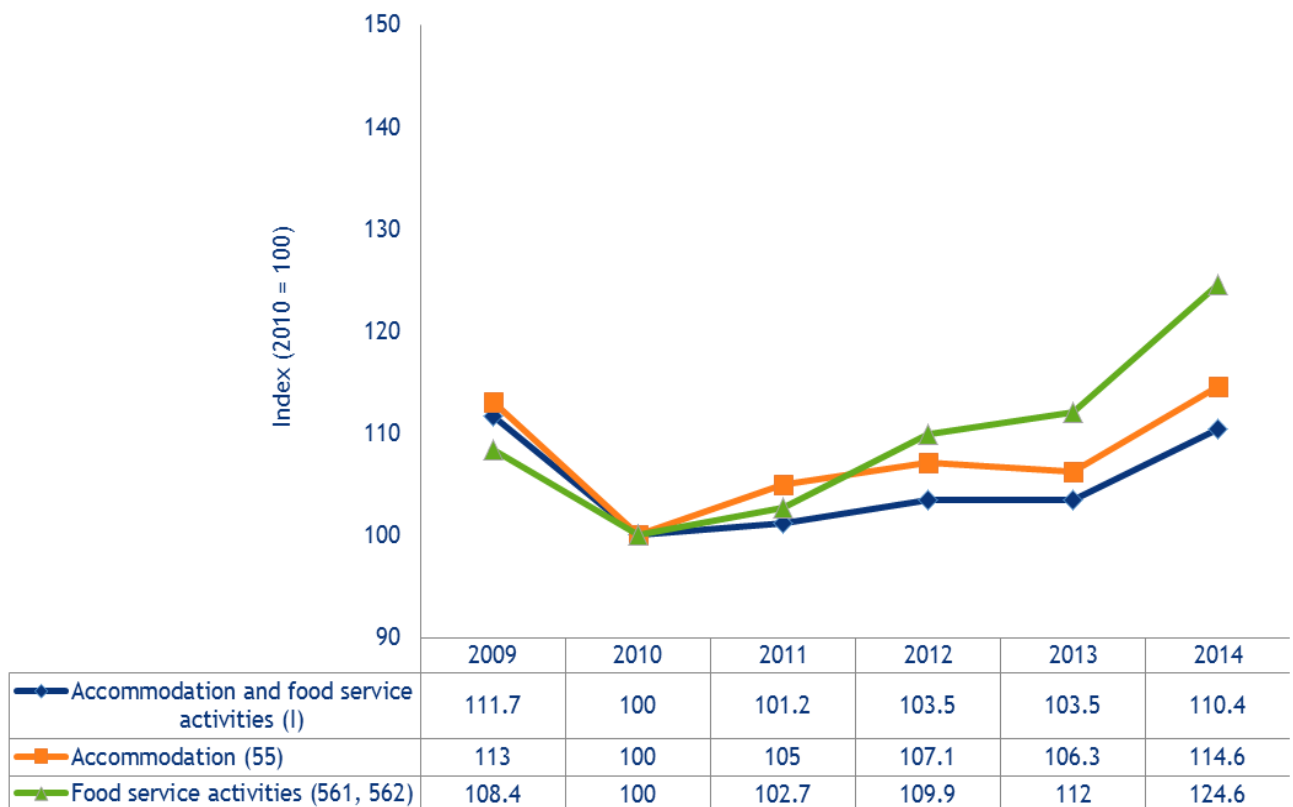
2.5.1 Overall Value of Accommodation and Food Service Activities

Figure 2.19 gives an overall picture of the trends in value of Accommodation and Food Service activities in Ireland between 2009 and 2014. The value of Accommodation and Food Service



activities increased across 2010 to 2014. Food service activity has since grown by more than accommodation, particularly in 2013 and 2014.

Figure 2.19 Services Value Index for Accommodation & Food Service Activities in Ireland (2009-2014)



Source: Indecon analysis of CSO data

2.5.2 Tourism Sector Developments

The hospitality sector caters to domestic consumers but its growth and success are also strongly influenced by developments in the Tourism sector. The number of visitors to the country significantly drives the performance of the Hospitality sector.

The United Nations World Tourism Organisation (UNWTO) reports that tourism accounts for 9% of global GDP, 6% of the world's exports and one in 11 jobs around the globe.⁶ The trend in global tourism numbers is illustrated in Figure 2.20. The total number of international tourists has grown from around 25 million in 1950 to over one billion in 2014. 2014 alone saw annual worldwide growth in international tourism of 4.7%. It should be noted that the total number of overseas visits to Ireland by non-residents increased by 8.8% between 2013 and 2014.

⁶ http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_highlights14_en.pdf

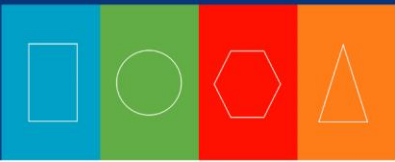
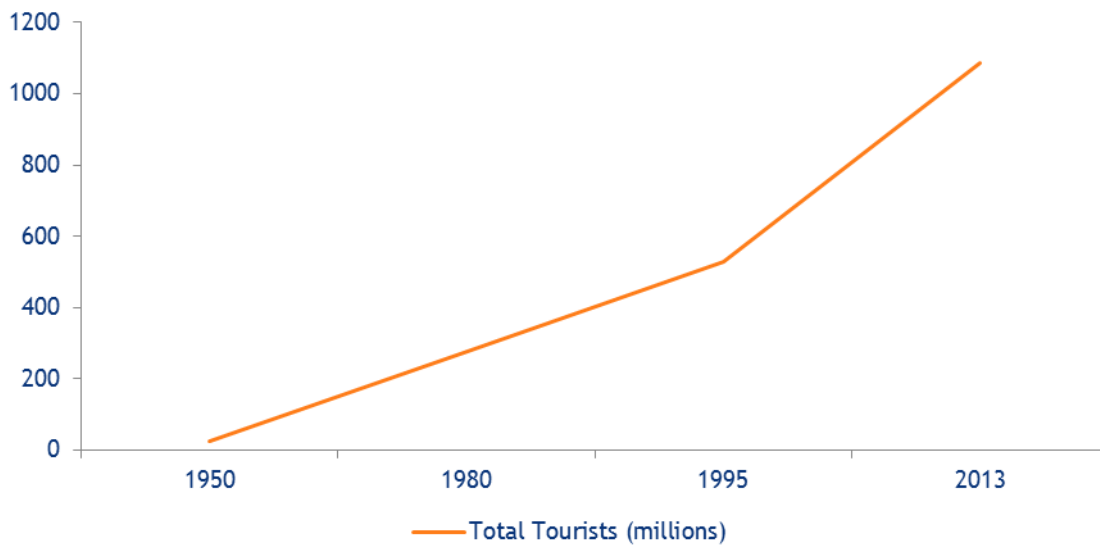


Figure 2.20: Historical trend in Global International Tourist Numbers



Source: Indecon analysis of UNWTO data

The UNWTO's long-term forecast, *'Tourism Towards 2030'* forecasts that international tourist arrivals worldwide will increase by around 3.3% per annum between 2010 and 2030 and that total international tourists will reach 1.8 billion by 2030. The UNWTO forecast notes that while China has already become the number one tourism source market in the world, it is set to further consolidate this position in the coming years as the Asia-Pacific region in general is highlighted as the highest potential growth source region for international tourists in the coming years.

Between 2009 and 2014, hotels in Ireland increased the number of bed-nights by non-residents on overseas trips from 11.2 to 14.7 million, an increase of 31.5% from the 2009 low point (Figure 2.21). Guesthouses and B&B accommodation bed-nights declined sharply to 4 million in 2010 but increased to nearly 5.2 million by 2014. The number of bed-nights in all categories grew during the years 2013 and 2014. The total number of bed-nights spent by non-residents on overseas trips in 2014 was just short of 55 million, an increase of nearly 15% in two years.

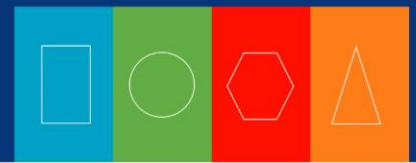
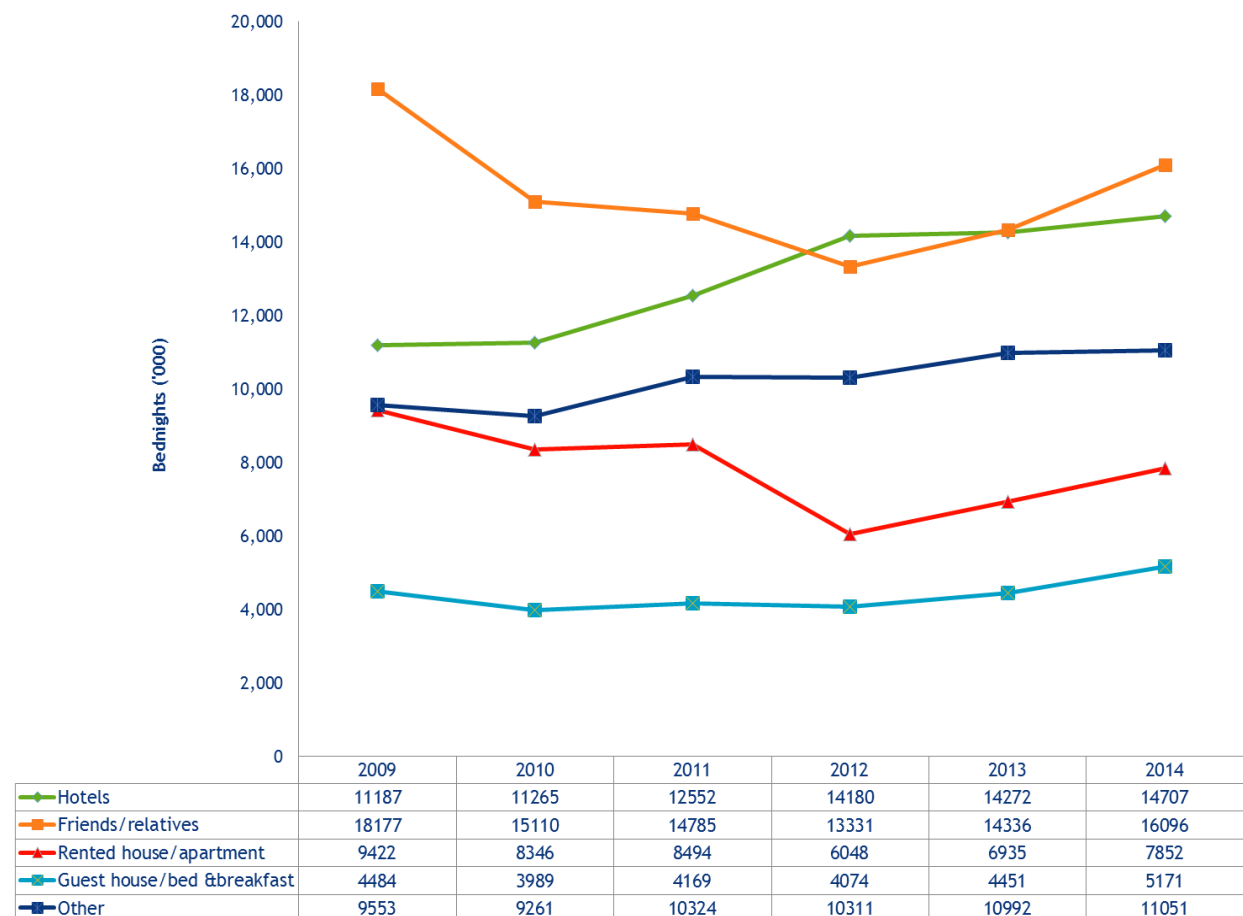


Figure 2.21: Number of Bed nights Spent in Ireland by Non-residents on Overseas Trips by Type of Accommodation (2009-14)



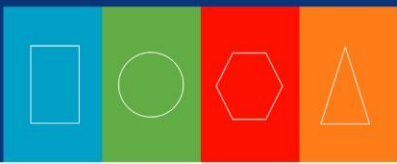
Source: Indecon analysis of CSO data

2.5.3 Demographic and Market Segment Trends

A number of key demographic and market segment trends are impacting on the demand for hospitality-related skills. These include:

- Aging populations will alter the mix and nature of products and services required.
- Continuing growth in the number of “digital travellers” using mobile platforms and applications, e.g., over 500 million Chinese accessed the web via a mobile device in 2014.⁷
- The on-going increase in overseas travel by Asian travellers, particularly Chinese.
- The growth in numbers of “millennials”, the fastest growing market segment, described as those with a strong focus on empathy, personal customer connection and personalised and local service offerings, expected to reach 50% of all travellers by 2025.
- More health- and environmentally-conscious travellers wanting to maintain healthy and sustainable carbon-neutral lifestyles on the road including access to fitness and well-being facilities and personalised food options.

⁷ Chinese International Travel Monitor 2014



- The growth of new hospitality products and services, for example, farms were the fastest growing visitor attraction category in England in 2014.⁸

2.5.4 Trends in Technology

There are a number of technologies that have been developed or are in development which are likely to be relevant to the hospitality sector including technologies which facilitate customer interaction and increased efficiency within businesses. Examples of new and advancing technologies that are likely to impact the hospitality sector are:

- Increases in collaborative consumption via peer-to-peer sharing platforms that disrupt traditional markets. Fáilte Ireland reports the value of the “sharing economy” as USD 26 billion in 2013, rising to USD 335 billion by 2025.⁹ Examples include: AirBnB for accommodation; Uber, Didi Kuaidi and Lynk for transport; and Eat-With and KitchenSurfing for meals;
- Advocacy platforms such as Flip.to which allow hotels and restaurants to engage with their guests in social media conversations and aim to encourage repeat visits;
- Growth of self-service and mobile phone check-in (automated receptionists);
- Growth in use of mobile apps such as HotelTonight so “Walk-in reservations” to hotels are likely to fall in number;
- Increasing technical integration in restaurants as digital diners research and check reviews to choose restaurants and menus, book particular tables, begin to demand mobile payment options (now in the early stages of adoption), and rate their experiences, all online, increasingly from smartphones and tablets;
- Growth in use of RFID¹⁰ hotel access/security systems linked to guest smartphones;
- Beverage dispensers (so-called robot bartenders) that automate the task of making multiple cocktails and other drinks with precisely measured ingredients;
- Handheld front-of-house ordering systems (POS) are becoming more common as are apps for employee rostering and attendance management (electronic timesheets with photo validation), e.g., Bizimply, are becoming more sophisticated; and,
- Collaborative apps, such as Google Docs for joint preparation of documents; Skype, FaceTime and Fuze for audio/video meetings; Evernote for sharing notes and notebooks; whiteboard tools such as Note Anytime and TalkBoard for brainstorming.

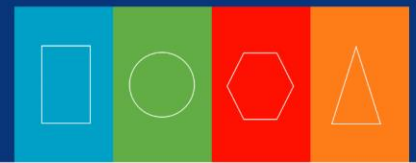
2.5.5 Market and Marketing Trends

Web platforms acting as agents and intermediaries between hospitality establishments and consumers have achieved strong market positions. Reacting to the growth of online travel agencies (OTAs) who can charge high commissions especially for premium placements, hotels are now highlighting the benefits of direct booking. Equally, the growth of third party restaurant discount vouchers/deal websites, e.g., GroupOn, Daily Deal, that promote deep discounts and can charge high commissions is spurring restaurateurs to engage in direct marketing initiatives with

⁸ VisitEngland Annual Attractions Survey 2014

⁹ Fáilte Ireland “#1 Trend: The Sharing Economy”

¹⁰ Radio Frequency Identification



consumers, e.g., Flip.to and to encourage repeat business. There has been significant growth of collaborative/sharing platforms such as AirBnB. Consumer direct service, cutting out the commercial middleman, is on the rise.

2.5.6 Implications of these Trends for Skills Requirements

There will be demand for new skills and training of Ireland's hospitality workforce in light of the above trends. Training modes will need to adapt to be more accessible and flexible using short on-line and off-line training modules, webinars and audio/video conferences to accommodate hospitality business schedules and seasonality. Collaborative apps will be most important in larger organisations spread over many geographic locations. They can facilitate skills development and teambuilding with less time off the job. Many of the new technologies will require frequent and regular CPD to ensure that technically capable front-of-house, ICT and maintenance staff, especially in hotels and restaurants, is abreast of ICT and RFID technology used by their visitors and can provide seamless connectivity across platforms and devices.

Accommodation sales, marketing and revenue management staff will need to continually update their skills in use of systems and tools to identify prospects and deliver customers at optimum REVPAR and occupancy rates and to by-pass OTA's. They need to gain direct access to customers to avoid high website promotional costs and commissions without tarnishing brand reputation by discrimination between direct and OTA guests. Revenue managers need all those technical and marketing skills and, particularly important, local knowledge.

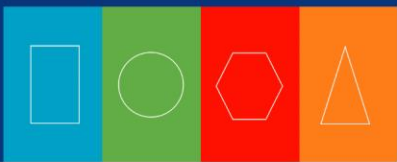
Restaurant and banqueting managers and front-of-house staff will also require CPD to help them in their efforts to maximize restaurant and function profitability in the context of increasing popularity of online restaurant booking sites and discount offers.

The growth in the Millennials category with their penchant for the personalised and local will place new skills demands on many parts of the hospitality sector. For example, as the population ages, tourism products and services will need to be tailored accordingly and the product mix will likely change, e.g., it is likely that cruise and cultural and heritage tourism will grow. Spa and health club trainers and other staff will need the knowledge and skills, including technological skills, to ensure provision of health club services to a more elderly clientele.

Front-of-house staff will need to update their knowledge of local tourist offerings appropriate to individual clients regularly, of whom many will have already researched alternatives online. So whereas the "digital traveller" is in a way less dependent on the traditional hotel concierge for guidance, there is a customer service imperative for hotel front-of-house staff to be able to provide all travellers with deeper local knowledge and individual value added.

With a growth in demand for healthy, local and personalized food and drink, often traceable back to the organic producer, chefs will need the knowledge, skills, flexibility and customer service-mindedness to select suppliers and ingredients and deliver more individualized dishes to clients who may also have special dietary requirements.

Indirectly, web platforms such as AirBnB, by adding to the mix of accommodation types available to visitors, will indirectly impact the supply/demand balance for different skills in the sector. For example, the demand for chefs could decrease if AirBnB clients are more likely to be self-catering for meals. Automated receptionist and concierge service may affect staffing levels, e.g., for night service in budget hotel accommodation. It is likely that there will be increased reliance on suppliers

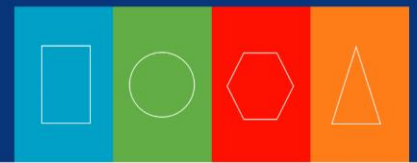


of new and updated equipment, systems and tools to the hospitality sector for provision of on-the-job and online training flexibly via webinars in the context of a broader need for accessible and flexible CPD using hospitality “toolkits”. This will be particularly the case for SMEs. The smartphone and tablet are important tools for such flexible training and other employee workplace uses, especially for training in policies, procedures and regulations, e.g., in food safety and hygiene where classroom interaction is not required.

2.6 Summary of Key Findings

This section has examined characteristics and data for the international Tourism and Hospitality sectors as well as those in Ireland. A summary of key findings is as follows:

- The Hospitality sector is comprised of hotels, restaurants, bars, pubs, canteens and catering operators. The majority of firms in the AFS sector (just over 80%) employ fewer than 10 people.
- 157,990 persons estimated to be employed in hospitality-related roles during 2014.
- Overall employment declined between 2008 and 2011 as the economic recession impacted on consumer spending. There has since been a rebound in the sector as the wider Irish economy has recovered. Continued recovery has implications for skill requirements in the sector.
- Employment in the AFS sector is characterised by large seasonal fluctuations.
- Part-time employment is an important component of employment in the Hospitality sector. Full-time employment in the AFS sector stood at 60% versus 40% part-time in Q4 2014 compared with a 77% to 23% ratio across all sectors of the Irish economy.
- Irish nationals accounted for 69% of employees in the Irish AFS sector during Q3 2014. This is much lower than the proportion of Irish employees in the wider economy (85%), signalling the importance of factoring migration into the assessment of possible sources of future skills supply in the Hospitality sector.
- There are significant numbers of skilled persons on the Live Register registered with INTREO employment services who are seeking employment in hospitality occupations, representing a potential skills pool. These individuals may need support to return to work.
- Hourly rates in the AFS sector ranked lowest of the NACE categories, with accommodation wages at €13.02/hr and F&B service at €12.11/hr (excluding tips). Average hourly earnings declined in the accommodation and the food and beverage services sectors from 2008 to 2014.
- Replacement rates were highest for waiters/waitresses and bar staff at 25% and 20% respectively in 2014 (although these exit rates are mitigated by a consistent annual supply of students), in stark contrast to the 4% reported for chefs.
- Staff turnover rates in hospitality-related occupations were highest for waiters/waitresses and bar staff in 2014, at 26% and 19%, respectively.
- High replacement/exit rates have implications for ongoing skill requirements for hospitality-related occupations and are particularly important for the purposes of considering various strategies with regards to staff retention, including education and training, and workplace conditions and remuneration. A particular challenge for the hospitality sector is the need to retain staff by providing appropriate education and training, and attractive career paths for individuals that wish to make hospitality a long-term career choice.



3. Evidence from Stakeholder Engagement

3.1 Introduction

An important feature of the analysis was an extensive programme of engagement with a wide range of stakeholders in the Hospitality sector. Evidence from stakeholder engagement is important to understanding details of the current employment and skills situation in the sector as well as determining needs for future progress of the sector. This section presents our findings from inputs by a variety of participants in the Hospitality sector. Many forms of engagement were undertaken, including:

- Interviews with hospitality businesses;
- Survey of hospitality businesses;
- Interviews with key hospitality sector informants; and,
- Regional workshops involving hospitality sector businesses and key informants.

In addition, engagement took place with a wide range of stakeholders, including:

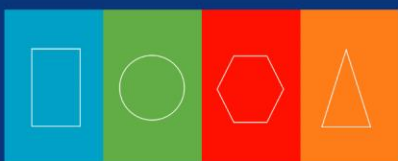
- Hospitality Businesses
- Sector Representative Associations
- Education/Training bodies
- Government agencies
- Recruitment Agencies

The comprehensive engagement programme entailed three elements: regional workshops, structured survey interviews and a detailed survey of hospitality businesses. Further stakeholder engagement and consultation with educators and industry representative associations was undertaken through meetings with and feedback from the Steering Group.

Regional Workshops

Three regional workshops were conducted in Dublin, Galway and Kerry involving participation from 81 hospitality businesses and key informants including:

- 24 Hotels
- 7 Restaurants
- 11 Pubs
- 12 Caterers
- 25 Educators
- 2 Others



Structured Survey Interviews

The target for the number of structured survey interviews was 55-60 including 40 hospitality businesses and 15-20 key informants. 117 potential respondents were contacted, of which 59 were interviewed. The breakdown of the 40 hospitality businesses interviewed included:

- 16 Hotels
- 14 Restaurants
- 8 Pubs
- 2 Caterers

The 19 key informants interviewed included:

- 9 Educators
- 6 Representative Associations
- 2 Recruitment Agencies
- 2 Others

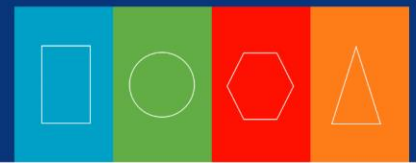
Table 3.1 below summarises our full engagement programme in terms of structured survey interviews completed relative to target.

Table 3.1: Business Establishments and Key Informants Interviewed

	<i>Target</i>	<i>Contacted</i>	<i>Completed</i>
Business Establishments			
Hotels	15	39	16
Restaurants	15	23	14
Pubs	8	27	8
Caterers	2	3	2
Total	40*	92	40
Key Informants (excluding business establishments)			
Educators	9	10	9
Representative Bodies	7	9	6
Recruitment Agencies	2	2	2
Other	2	4	2
Total	15-20*	25	19
Grand Total	55-60*	117	59

* *Target set in the terms of reference for the study.*

Source: Indecon analysis



Survey of Hospitality Businesses by Questionnaire

While not originally proposed, in addition to the structured survey interviews, a separate Indecon questionnaire-based survey of businesses was conducted, providing information from 88 additional businesses in the Hospitality sector. The characteristics of respondents to the confidential survey are presented in Annex 2.

Use of Terminology by Business and Key Informants

There is no consistent use of the terms “skills gaps” and “skills shortages” by business establishments and key informants in the Hospitality sector. The terms tend to be used interchangeably, as has been done in this study.

At the same time, it should be noted that skills gaps or shortages occur in two broad but overlapping categories. There can be an insufficient number of qualified people graduating and/or applying to fill vacancies. There can also be many applicants for a position, but they may lack some or all of the particular qualifications, skills and experience required for the job. They are the two sides of the same coin.

The above definitions, however, should be distinguished for the term ‘shortfall’, which denotes a potential shortfall of skilled individuals at occupational level within the context of the skills demand and supply scenarios modelled elsewhere in this report.

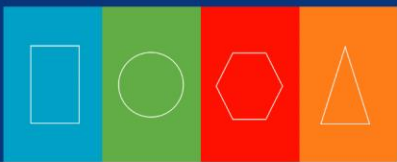
3.2 Current Skills Gaps

A significant challenge for employers in the Hospitality sector is the gap between their need for particular skills and the availability of employees who possess those skills. In regional workshops, the following skills categories are currently in short supply:

- Chefs (including pastry and chefs de partie);
- Management Skills (including revenue management);
- Bar and waiting staff; and,
- Reception and front-of-house.

Following on the above three themes, structured interviews were held to gather additional detailed information with regards to the current skills shortages in the sector. Stakeholders indicated that the main skill shortages tend to be among chefs and cooks, and in particular, commis chefs, chefs with experience, passion for their work, and a cultural fit with the particular hospitality establishment. Additional skill gaps identified include:

- Food and beverage supervisors with management skills;
- Revenue managers with local knowledge;
- Executive housekeepers;
- Sales and marketing executives;
- Basic skills in all departments at entry/junior level;
- Customer service-mindedness and upselling skills; and,



- Specialist knowledge: management, employment law, licensing law, consumer law, minimum pricing, allergens.

It is apparent that there can be significant variance in skill shortages and difficulty filling vacancies by geographic location, not just in remote rural locations but also in terms of proximity of rental accommodation and access to public transport in urban areas.

3.2.1 Vacancies by Occupation

The respondents to our survey of hospitality businesses indicated vacancies by occupation, which is informative in terms of the impact of skill gaps on employment in the sector. Data was collected on percentage of vacancies, vacancy rates, and percentage of firms with difficulty filling vacancies (see table below).

The survey responses show that cooks and chefs (all skill levels) have relatively high vacancy rates at 12% - 33%. Approximately 10% - 13% of organisations surveyed indicated that they expect difficulty in filling vacancies in these jobs. The occupation proving the most difficult in which to fill vacancies is waiting staff, with 33% of respondents reporting difficulty. Bar staff and cleaners/domestics also ranked highly in terms of difficulty in filling vacancies, at 24% and 20%, respectively.

Table 3.2 shows that even for some occupations with low vacancy rates, firms have reported a notable level of expected difficulty in filling those vacancies. For example, catering and bar managers have a vacancy rate of 3%, but 15% of firms expect difficulty in filling even that level of vacancy. Similarly, porters/kitchen porters and cleaners/domestics have vacancy rates of 4% - 6%; however, expected difficulty filling those vacancies is 18% - 20%.

Indeed, most occupations on the table below have “difficulty filling” rates higher than actual vacancy rates, indicating that the problem lies with finding employees with skills to match the occupation.

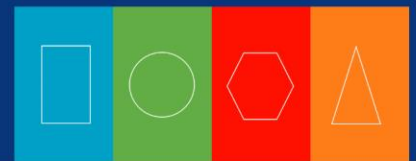


Table 3.2: Vacancies by Occupation - Respondents to survey of hospitality businesses

	% of Vacancies	Vacancy Rate	% of Firms Expecting Difficulty in Filling Vacancy
Waiters / waitresses	21%	8%	33%
Bar staff	14%	9%	24%
Cleaners and domestics	5%	6%	20%
Receptionists and receptionist-telephonists	4%	5%	19%
Housekeepers and related occupations	10%	8%	18%
Kitchen and catering assistants	3%	6%	18%
Porters / kitchen porters	3%	4%	18%
Administration staff	2%	3%	16%
Catering and bar managers	1%	3%	15%
Other chefs including sous chefs, commis chefs, chefs de partie, junior chefs de partie	18%	12%	13%
Sales and retail assistants	2%	6%	13%
Cooks	5%	33%	11%
Head/Executive chefs	3%	13%	10%
Publicans and managers of licensed premises	0%	0%	9%
Hotel / restaurant and other managers	7%	8%	8%
Other	4%	5%	5%

Source: Indecon Confidential Survey of Hospitality-Related Organisations

Respondents were asked to assess their demand for skills at various levels and whether there is adequate skill availability, moderate skill shortage, or significant skill shortage. The results indicate that the biggest skill shortage is at the Higher Craft Level, with 53% of respondents indicating a significant skill shortage and 38% a moderate skill shortage (91% combined), and only 9% felt there is adequate skill availability. At the Trained Craft Level, 39% of respondents indicated a significant skill shortage and 43% a moderate skill shortage (82% combined), with 18% indicating adequate skill availability. More adequate skill availability is indicated at three of the other four levels: Basic Education (70%), Entry Level (60%), and Postgraduate Levels (48%). Whereas at Degree Level/Higher Degree Level, a combined 62% consider that a moderate or significant shortage exists.

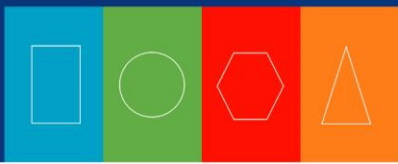
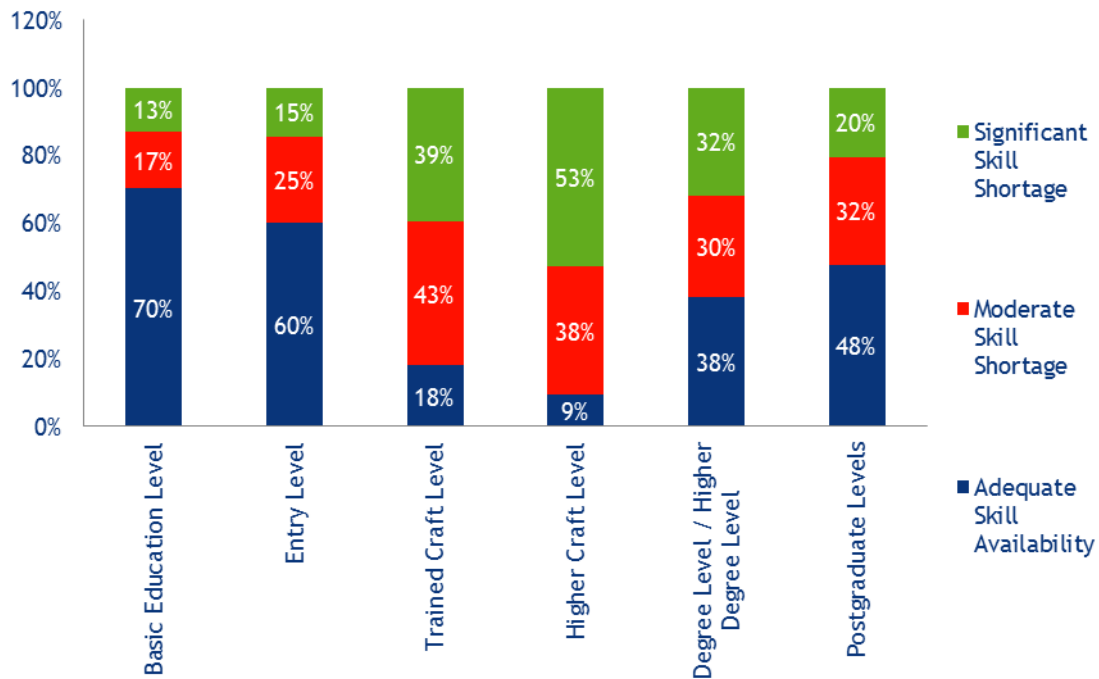


Figure 3.1: Assessment of Skill Demand at Different Levels - Current Requirements - % of Responding Hospitality Businesses

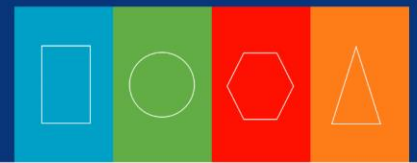


Source: Indecon Confidential Survey of Hospitality-Related Organisations

3.3 Reasons stated for Skills Gaps

In order to address the skills recruitment difficulties revealed by the survey information in the previous section, stakeholders were asked the reasons for these gaps. Their information and opinions will help to identify specific items that may be actionable in terms of strategy to close current and anticipated skills gaps. Reasons for skills gaps given at regional meetings of stakeholder organisations included:

- Negative perceptions of the hospitality sector, including in relation to work conditions and career progression, with the sector not seen as a desirable career choice for school leavers;
- Candidate selection by colleges is largely based on CAO points and does not sufficiently take into account personality traits required for a career in hospitality, in particular for front-of-house and waiting staff;
- Administrative burden is one factor in businesses not having time to implement proper training systems, particularly in smaller establishments;
- Colleges are sometimes unable to provide a sufficient element of training in practical skills due to budget cutbacks that necessarily impinged on more costly practical training; and,
- The merger of CERT with Bord Fáilte in 2003, prioritisation of marketing budget over training budget by Fáilte Ireland in the downturn, and closure of Fáilte Ireland training centres.



Additional details were obtained on reasons for skills shortages from structured interviews with stakeholders and found the following results. The main reason given for skills shortages was that there are not enough people with appropriate training or experience. Additional issues revealed in the interviews include:

- Once again, perceptions of the Hospitality sector are that it is not a first choice career;
- Training is still considered by some SME owners as a cost to be avoided rather than as an investment for the future, whereas larger business establishments typically do not share this viewpoint;

Guidance counsellors in schools are said to err against recommending hospitality or “catering” as a proper career choice. Parents often think likewise and their children may focus on the CAO 3rd level points race and more “professional” career choices;

The immobility of staff within Ireland is noteworthy due in part to such factors as the cost of rental accommodation and location vis-à-vis public transport routes. Yet by contrast there is mobility to go abroad;

Growth in contract catering, the increase in numbers of filling stations with cafés, the increased need for chefs working in big supermarket chains and retail, and the surge in a café culture all mean that culinary-trained workers have more attractive alternatives;

The impact of education funding cuts is now being felt, particularly where cutbacks have focused on the more costly practical skills training. There has been a shift to more academic, less hands-on training, and basic skills training is missing;

- Interaction between industry and educators varies but inevitably there is room for improvement in structured communication and better input into programme design and candidate selection;
- Inadequate candidate selection by educational institutes; and,
- There is little or no provision for Continuing Professional Development (CPD).

This is not to say that interviewees were completely unaware of available education and training opportunities, including newer initiatives in progress, but their understanding was fragmented and unclear and sometimes may have been based on the historic reputation of a particular institute rather than current knowledge.

Respondents were also asked for their views on the significance of different reasons for any skill gaps (Figure 3.2). They indicated that the most significant reason was that there are not enough people in Ireland with appropriate training (82% rating it very significant or significant). The second most significant reason is that there are not enough people in Ireland with the right level of experience (74% rating it very significant or significant). The third most significant reason given was that although the skills may be available, employees are not interested in the positions available (73% rating it very significant or significant). Additional significant reasons include that skills are available but too expensive (54%) and the difficulty of retaining employees with skills once recruited (48%). Difficulty attracting skilled workers from other countries is much less significant with only a combined 35% regarding this as a very significant or significant reason.

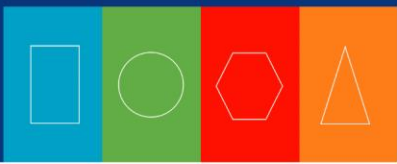
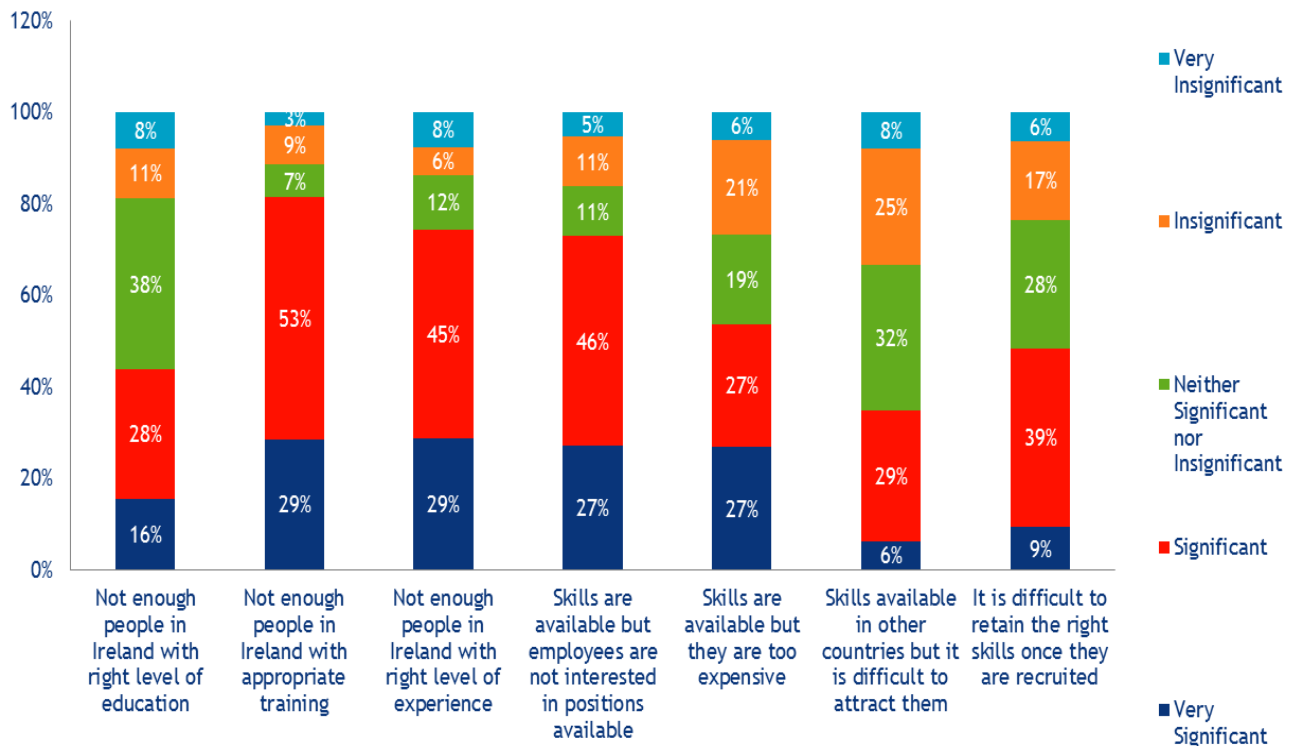


Figure 3.2: Views on Significance of Reasons for Any Skill Gaps - % of Responding Hospitality Businesses



Note: Percentages may not sum exactly to 100% due to rounding differences in underlying data.

Source: Indecon Confidential Survey of Hospitality-Related Organisations

Respondents also gave their views on the main factors influencing staff turnover. By far the most important reason given was staff securing jobs in other sectors with better conditions and more sociable hours (a combined 81% ranked it very important or important). The second most important reason for turnover was staff securing better-paid jobs in other sectors (a combined 66% ranking it important or very important). The third most important reason, that staff are securing jobs in other hospitality businesses (a combined 55%), indicates a significant level of churn within the hospitality sector. These high numbers are significant and suggest that both pay and conditions are the main reasons for staff turnover and will have implications for employee retention strategies. Additional reasons and their level of importance for turnover can be seen in Table 3.3.

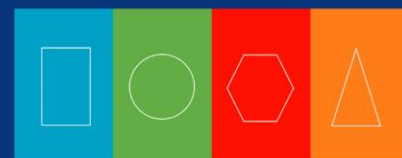
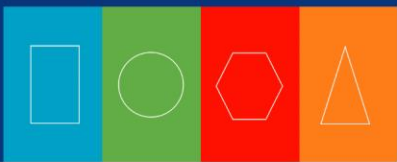


Table 3.3: Views on the Main Factors Influencing Staff Turnover - % of Respondent Businesses

	Very Important	Important	Neither Important nor Unimportant	Unimportant	Very Unimportant	Total
Staff securing jobs in other sectors with more sociable hours / better conditions	56%	25%	9%	7%	3%	100%
Staff securing better paid jobs in other sectors	28%	38%	23%	7%	4%	100%
Staff securing jobs in other hospitality businesses	23%	32%	32%	8%	6%	100%
Staff emigrating	22%	34%	22%	15%	7%	100%
Staff returning to education / training	14%	46%	19%	14%	6%	100%
Staff leaving for family / personal reasons	12%	31%	37%	16%	3%	100%
Staff returning to unemployment / job search	12%	23%	32%	24%	9%	100%
Staff found to be unsuitable and dismissed	8%	20%	38%	22%	12%	100%

Note: Percentages may not sum exactly to 100% due to rounding differences in underlying data.

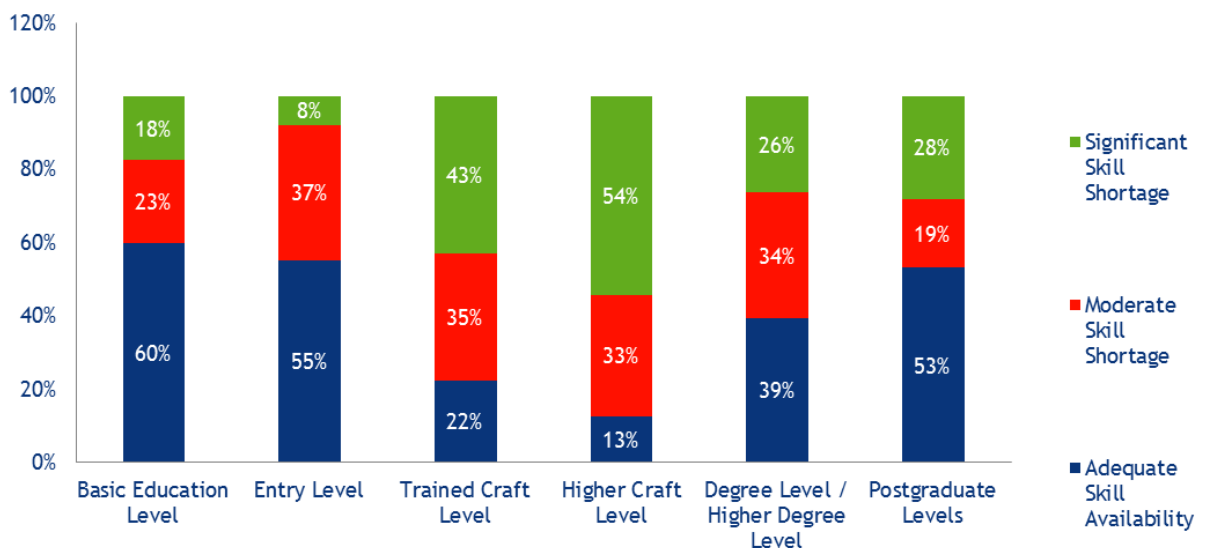
Source: Indecon Confidential Survey of Hospitality-Related Organisations



3.4 Anticipated Demand and Skills Gaps to 2020

Information was also provided by stakeholders at the regional meetings concerning specific areas of skills gaps likely to continue into the future. Additional details were obtained from the surveys of hospitality sector organisations. The areas with current skills gaps are also the ones expected to continue into the future. Higher Craft Level is expected to have a significant or moderate skills shortage by 87% of respondents; Trained Craft Level is expected to have a significant or moderate skills shortage by 78% of respondents. Respondents' expectations at other training levels can be seen in Figure 3.3.

Figure 3.3: Assessment of Skill Demand at Different Levels - Future Requirements - % of Responding Hospitality Businesses



Note: Percentages may not sum exactly to 100% due to rounding differences in underlying data.
 Source: Indecon Confidential Survey of Hospitality-Related Organisations

Survey participants were also asked to forecast changes in the required numbers of employees by occupation to 2020. Results are divided between the next two charts. Chefs, waiters/waitresses, cooks, kitchen/catering assistants and head chefs all rank at 10% or greater annual change (13%, 12%, 11%, 11% and 10%, respectively).

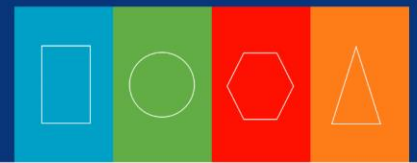
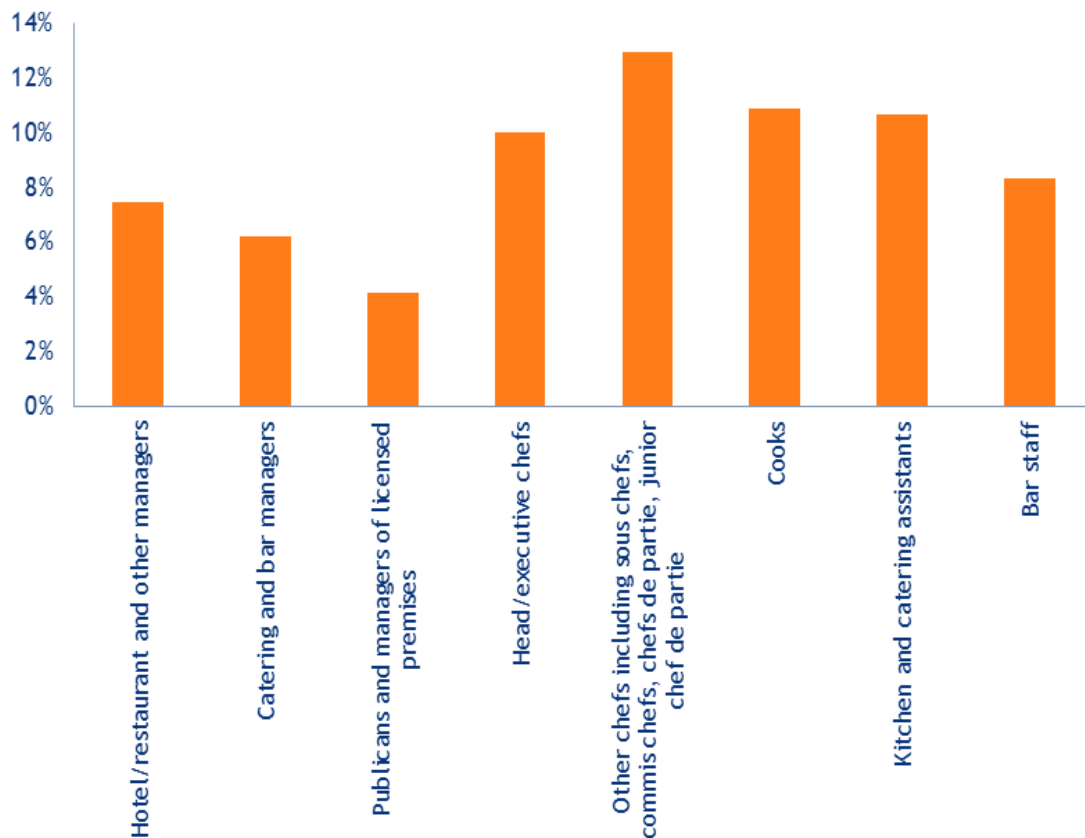


Figure 3.4: Estimates of Percentage Annual Change in the Number of Employees Required by Category in Years to 2020 - Weighted Average



Source: Indecon Confidential Survey of Hospitality-Related Organisations

Respondents forecast growth of between 8% and 9% per annum for the following occupations: porters/kitchen porters, cleaners/domestics, bar staff, housekeepers and receptionist/telephonists. Managerial, administration and sales/marketing staffs tend to have lower percentages. Pub owners and managers show the lowest expected growth rate forecast (4%).

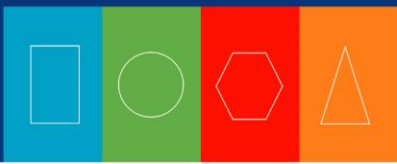
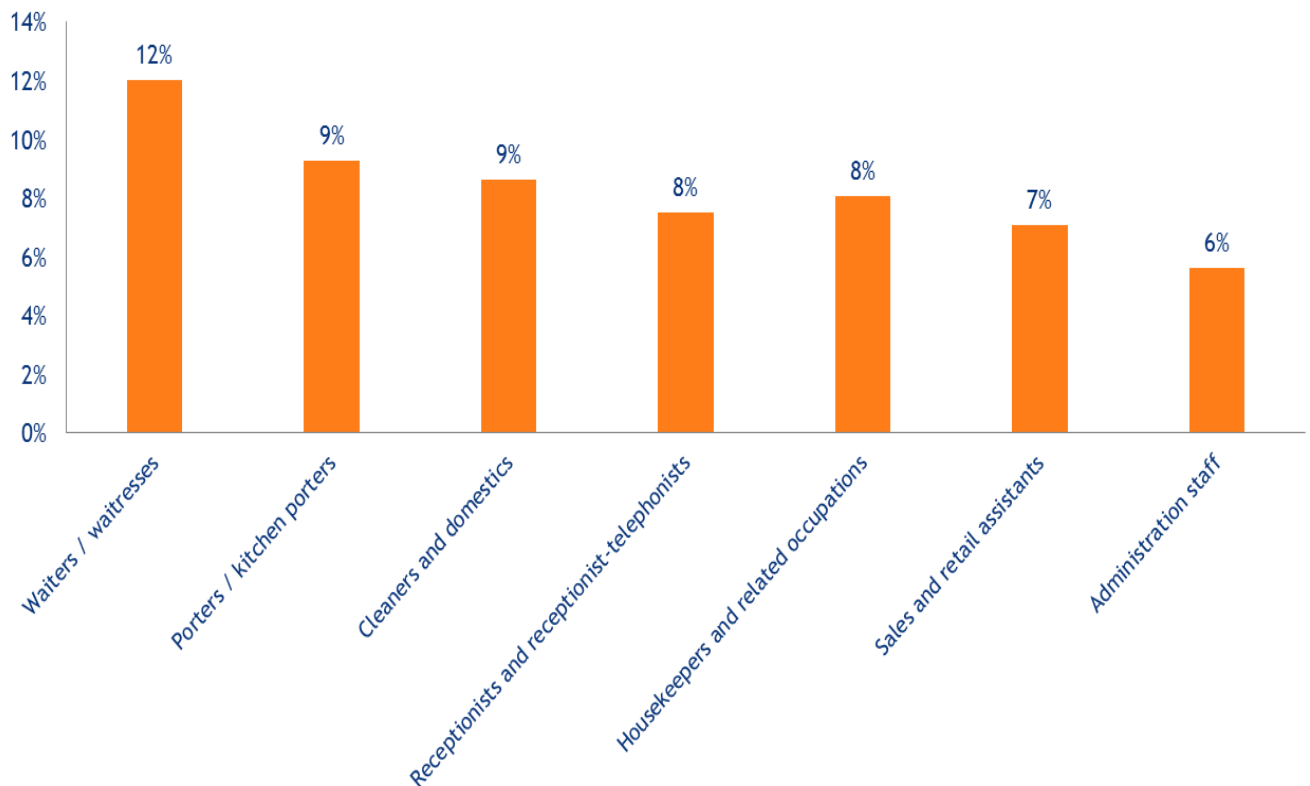


Figure 3.5: Estimates of Percentage Annual Change in the Number of Employees Required by Category in Years to 2020 - Weighted Average (Continued)



Source: Indecon Confidential Survey of Hospitality-Related Organisations

The biggest driver of supply out to 2020 is expected to be increased business activity and employment demand (96% of respondents indicated this is very significant or significant). Other important drivers are expected to be an imbalance of mix of skills from education/training sector (86% of respondents indicated this very significant or significant); increased demand for skills from other sectors (72% ranked this very significant or significant); and changes in business model (60% ranked this very significant or significant). All are significant percentages. Only in the case of restrictions on work permit availability is there any appreciable proportion of insignificant and very insignificant (22%) but even then, 47% consider that this is a very significant or significant factor (Figure 3.6).

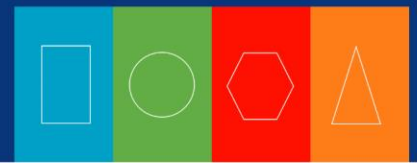
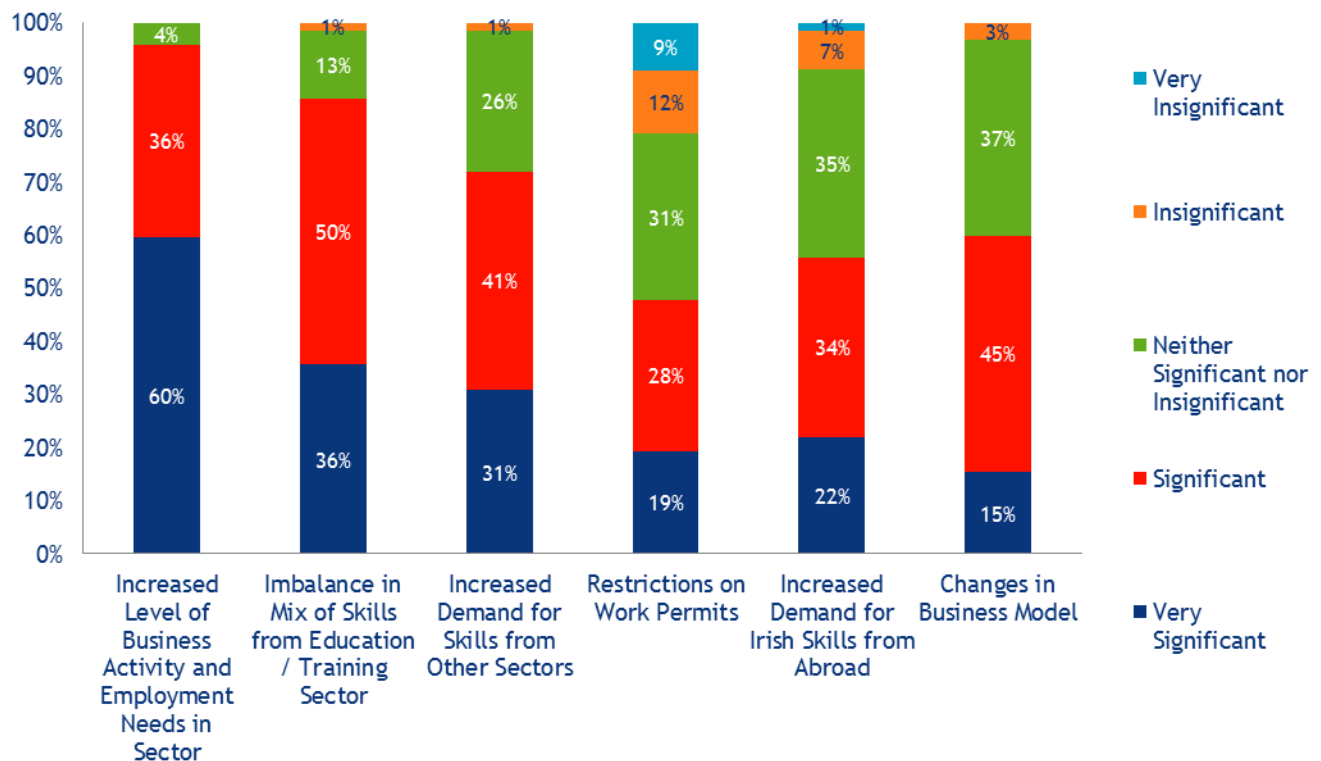


Figure 3.6: Views on the Main Trends Driving the Supply of Skills in the Hospitality Sector in Ireland over the Years to 2020 - % of Respondent Businesses



Note: Percentages may not sum exactly to 100% due to rounding differences in underlying data.

Source: Indecon Confidential Survey of Hospitality-Related Organisations

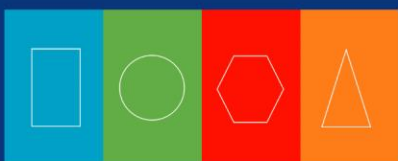
3.5 Current Responses to Skills Gaps

Hospitality business establishments reported in the three regional workshops dealing with skills shortages buy in-house training, up-skilling/reskilling as well as recruitment of non-Irish nationals.

These were confirmed in structured survey interviews, as were staff retention initiatives, recruitment within Ireland, and career progression initiatives. Other responses mentioned included:

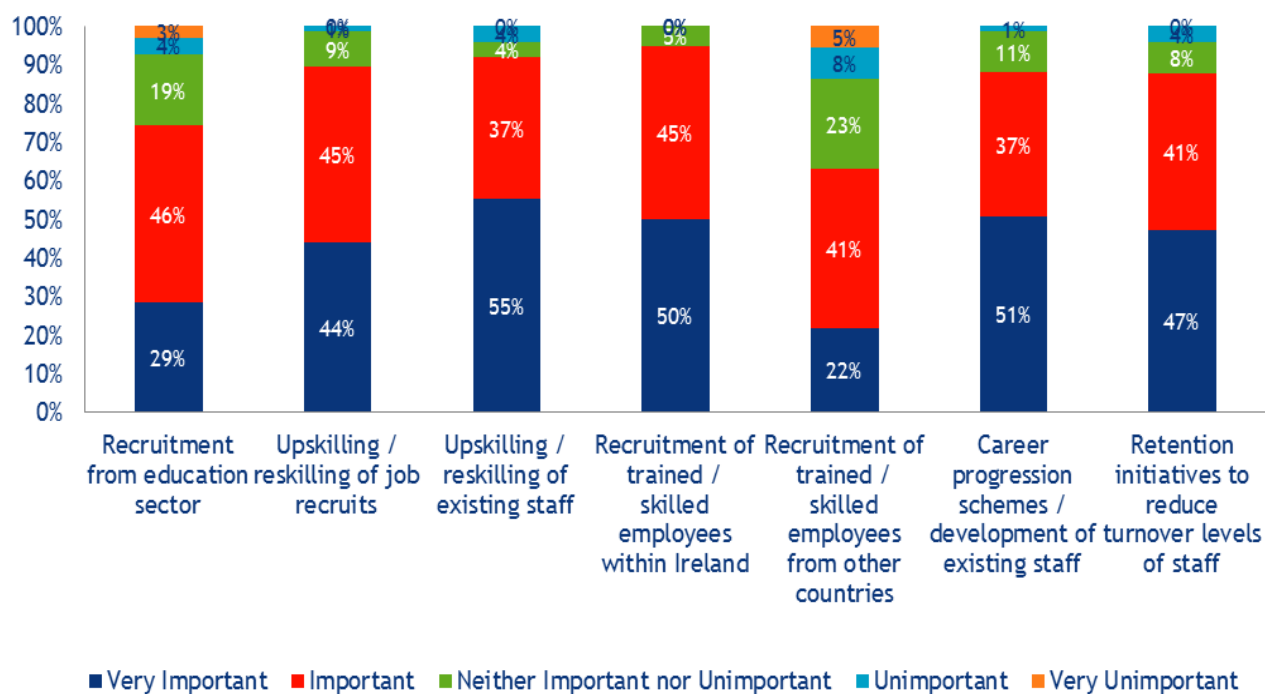
- Refinement of recruitment processes;
- Taking trainees/interns from Irish and foreign schools;
- Training in-house and on-the-job for basic skills, establishing personal training plans, induction of new staff;
- Reduction/simplification of menus; and,
- As a last resort, closing the business for part of the week, e.g., on Sunday and Monday.

Survey respondents were asked for their views on the importance of plans to address skills gaps in their businesses and found that recruitment of trained/skilled workers within Ireland was ranked highest, with 95% of respondents indicating it was very important or important (Figure 3.7). Upskilling/reskilling existing staff was ranked second, with 92% of respondents indicating this was very important or important. Upskilling/reskilling of job recruits was ranked closely behind, with



89% of respondents indicating this was very important or important. Career progression schemes and retention schemes were also ranked highly (88% of respondents indicating both of these were very important or important). These views on importance of plans to address skill gaps can inform strategies and incentives for development across the sector.

Figure 3.7: Views on Importance of Plans to Address Skill Gaps in Your Businesses



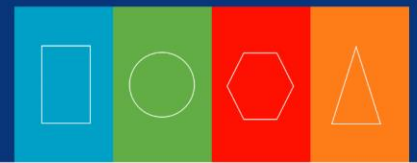
Note: Percentages may not sum exactly to 100% due to rounding differences in underlying data.

Source: Indecon Confidential Survey of Hospitality-Related Organisations

3.6 Appropriate Responses to Anticipated Skills Shortages

Participants in regional workshops discussed what actions should be taken by businesses in the hospitality sector in response to anticipated skills shortages. Main responses included improving the image of the sector, promotion schemes, in-house training, retention schemes and integration with the educational sector.

Interviews with stakeholders included responses such as increased output from education and training establishments, more investment in apprenticeships, promotion of career opportunities to school leavers, improve perception of sector by treating employees fairly and with respect, and a cohesive plan to promote hospitality. Smaller business could outsource or otherwise share support services such as HR managers, hospitality “toolkits” could be developed for key training areas (such as profitability, revenue management, cost control and staff rostering, upselling, human resource management, train the trainers, social media, technology, local knowledge, hospitality entrepreneurship, foreign languages for front-of-house, etc.), and the sector should tap into the “grey” workforce reducing dependence on “youth”.



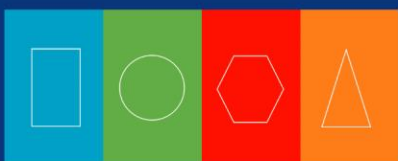
Participants in regional workshops also indicated that changes should be made by education/training institutions including: balance between work experience and education; communication and greater linkages with industry; additional shorter training; craft and practical courses; and more apprenticeships.

Structured survey interviews with educators in the hospitality sector revealed suggestions for improvement by increasing output as well as more investment in apprenticeships. Other suggested responses to skill gaps include:

- Encourage realistic student expectations;
- Set minimum qualification standards for work in the sector;
- Set national standards for courses up to Level 6;
- Restore focus on practical skills training across the board;
- New emphases on CPD and on more accessible courses;
- Establish “industry engagement offices”;
- Improve vetting of hospitality course applicants;
- Establish a two-year culinary apprenticeship;
- Establish a Hospitality sector induction course;
- Establish minimum CPD standards for hospitality lecturers; and,
- Accreditation/certificates for on-the-job training.

Suggestions for government intervention included the following:

- Targeted funding for training/apprenticeships;
- Incentives to businesses/employers for training and upskilling, particularly to SMEs;
- Raise profile of sector particularly for young people, e.g., through home economics, career guidance;
- Assess measures and legislation introduced by Government: high regulation, Sunday premiums, work permits, calorie counts, allergy requirements, minimum wage;
- Permanent oversight and co-ordination body for hospitality sector development and promotion;
- Redesign “Home Economics” curriculum to be more hospitality sector-and male student-friendly and rename it appropriately;
- Develop a Leaving Cert stream: ‘Irish Hospitality and Tourism Studies’;
- No change in VAT;
- Examine merits of establishing a residential hospitality school (incl. culinary);
- Review service level agreements between Fáilte Ireland and IoTs;
- Consider appointing INTREO hospitality sector ‘specialists’;
- Prioritise the provision of work visas to areas where there are skills shortages - such as hospitality; and,
- Initiate a national programme to attract Irish diaspora.

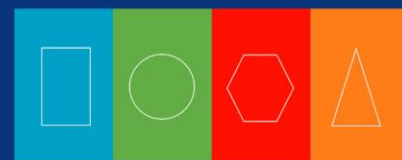


Hospitality businesses were asked for their views on the appropriateness of possible responses to skills shortages in the sector. Significantly, 100% of respondents agreed that increased investment by businesses in training and career progression is very appropriate or appropriate. The second ranked response is increased output from training institutions/education sector (97% of respondents indicated very appropriate or appropriate). Other important responses are listed in Table 3.4. The only response to receive a significant number of views as not appropriate was an increased number of employment permits, with 36% of respondents indicating this is not appropriate.

Table 3.4: Views on the Appropriateness of Possible Responses to Skill Shortages in the Sector - % of Responding Hospitality Businesses

	Very Appropriate	Appropriate	Not Appropriate	Total
Increase Investment by Businesses in Training/Career Progression	56%	44%	0%	100%
Increased Output from Training Institutions/Education Sector	66%	31%	3%	100%
Increase in Accredited Educational Provisions and Awards at Level 2 + 3	46%	50%	4%	100%
Increased Focus on Talent Recruitment/Retention	62%	33%	5%	100%
More Investment in Apprenticeships	65%	29%	6%	100%
Promotion by Business of Opportunities to School Leavers	62%	32%	6%	100%
Enhanced Pathways from Levels 4 + 5 to Level 6	45%	46%	9%	100%
Greater Use of Recognised Prior Learning	28%	60%	12%	100%
Increased Number of Employment Permits	32%	32%	36%	100%

Source: Indecon Confidential Survey of Hospitality-Related Organisations



3.6.1 Characteristics of Hospitality Sector from Surveys

Staff turnover

As part of the survey research, hospitality-related organisations were asked to provide an indication of annual average percentage of staff turnover, excluding seasonal workers. The results are listed in Table 3.5. Overall, respondents indicated an average annual staff turnover rate of 15%, with a low of 9% in the canteen/catering subsector, and a high of 19% in the bar/pub subsector.

Table 3.5: Average Annual Percentage of Staff Turnover Excluding Seasonal Workers - Respondent Businesses

	%
Hotel	15%
Restaurant	14%
Bar / Pub	19%
Canteen / Catering	9%
Other	15%
Overall across respondents	15%

Source: Indecon Confidential Survey of Hospitality-Related Organisations

As regards the nature of employment in hospitality businesses, it was found that an average of 3% were employed as or by contractors, 17% were seasonal staff, and that 25% of employees were paid at the minimum wage.

Table 3.6: Nature of Employment in Respondent Businesses

	Average	Median
% of team employed as / by contractors	3%	0%
% of staff representing seasonal employment	17%	10%
% of employees paid at the minimum wage	25%	20%

Source: Indecon Confidential Survey of Hospitality-Related Organisations

In Table 3.7 the average weighted by employment is lower than the simple average - indicating that smaller businesses (as proxied by total number of employees) demonstrate a higher percentage of existing staff at lower skill levels that have been promoted to other positions in the business.

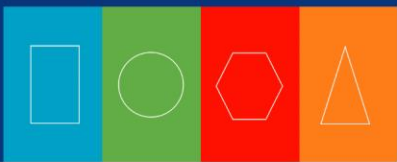


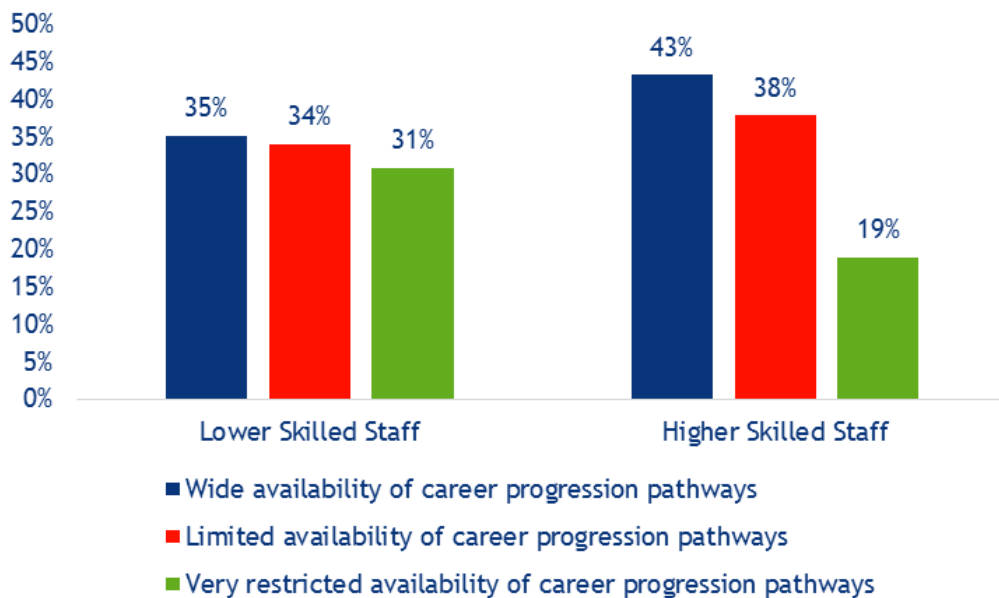
Table 3.7: Percentage of Existing Staff at Lower Skill Levels that have Been Promoted over the Last 5 Years to Other Positions in Your Business - Average across Respondent Businesses

	%
Average across respondents	12%
Average across respondents - weighted by total employment	9%

Source: Indecon Confidential Survey of Hospitality-Related Organisations

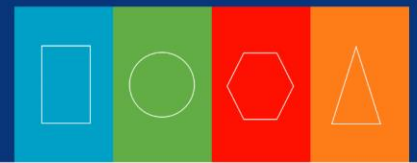
Views on availability of career prospects and progression pathways in the Hospitality sector were that two-thirds of respondents (65%) felt that career prospects were either limited or very restricted for low skilled staff. More than half (57%) of respondents consider the career prospects of highly skilled staff as either limited or very restricted. These views are indicative of a widely held view that career prospects in the sector are poor for the majority of employees at all skill levels (Figure 3.8).

Figure 3.8: Views on the Availability of Career Prospects / Progression Pathways in the Hospitality Sector



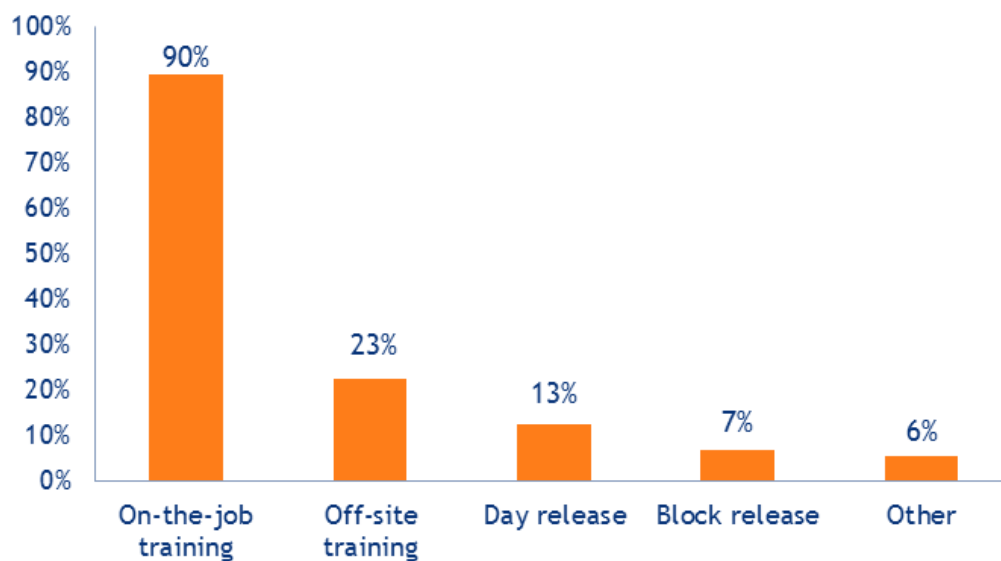
Source: Indecon Confidential Survey of Hospitality-Related Organisations

Respondents were also asked to indicate their current methods of staff training. It was found that the majority (90%) use on-the-job training as a main method of training. Off-site training was used as a main method by only 23% of respondents and day-release and block release were used by only 13% and 7%, respectively. The prevalence of on-the-job training in conjunction with the existence of



skill gaps may suggest improvement could be made in terms of accessibility and scheduling of training including consideration of alternative online web-based methods. This would benefit both employers and trainees.

Figure 3.9: Current Main Methods of Staff Training - % of Respondent Businesses



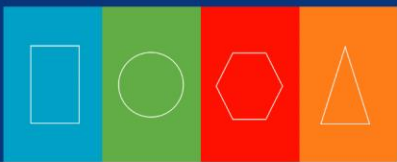
Source: Indecon Confidential Survey of Hospitality-Related Organisations

3.7 Summary of Key Findings

This chapter has presented an analysis of the inputs from the extensive programme of stakeholder engagement. The key findings are outlined below.

3.7.1 Conclusions re Current/Anticipated Skills Shortages

- Main skills shortages seen as being amongst chefs;
- Shortages of commis chefs feed into shortages at higher and specialist levels (demi chef, chef de partie, pastry chef);
- In particular, shortage of chefs with passion, experience and cultural “fit”;
- Executive/head chefs, shortage not as significant;
- Basic skills missing in all departments at entry/junior level;
- Management skills, e.g., revenue managers with local knowledge, F&B supervisors with management skills, HR skills, general management skills for business owners);
- Specialised reception and front-of-house skills;
- Bar staff with waiting skills for food service and modern drink skills;
- Executive housekeepers;
- Customer service-mindedness and upselling skills;



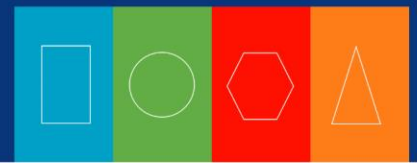
- Specialist knowledge: employment law, licensing law, consumer law, minimum pricing, allergens;
- Many applications may be submitted, yet few appropriately qualified applicants;
- Some variance in skill shortages by geographic area;
- Same skill shortages anticipated to worsen; and,
- Need for tourism entrepreneurs and product and service development.

3.7.2 Conclusions re Reasons for Skills Shortages stated by Stakeholders

- Lack of people with appropriate training and/or experience;
- Negative perceptions and reputation of hospitality sector;
- Staff transferring out of sector or within sector (to catering, filling stations, retail, café culture: more sociable/predictable working hours);
- Staff moving abroad yet immobility of staff within Ireland (high cost of rental accommodation; poor access to public transport routes); and,
- Issues relevant to education and training: Closure of Fáilte Ireland training centres; balance between academic and hands-on training; need for basic and specialised practical skills; provision for accessible and flexible continuous professional development; access to training in rural areas; programme design input from business establishments; and candidate selection and potential impact on drop-out rates.

3.7.3 Summary of Responses by Businesses

- “Fire-fighting” or often in near-crisis mode for difficult-to-fill vacancies;
- Foreign recruitment (often through personal contacts of existing foreign staff);
- Increased emphasis on in-house/on-the-job training targeted to immediate needs;
- Induction programmes;
- Basic skills training on-the-job;
- Upskilling existing staff;
- Re-skilling existing staff for new roles;
- Personal training plans;
- Reduce/simplify menus;
- Close Sunday and Monday as a last resort;
- Importance of HR initiatives;
- Refinement of recruitment processes;
- Those who respect their staff earn staff loyalty and experience fewer skills shortages;
- Trainees/interns from Irish and foreign schools; and,
- Career progression and retention initiatives.



4. Current Skills and Education Provision - Supply Analysis

4.1 Introduction

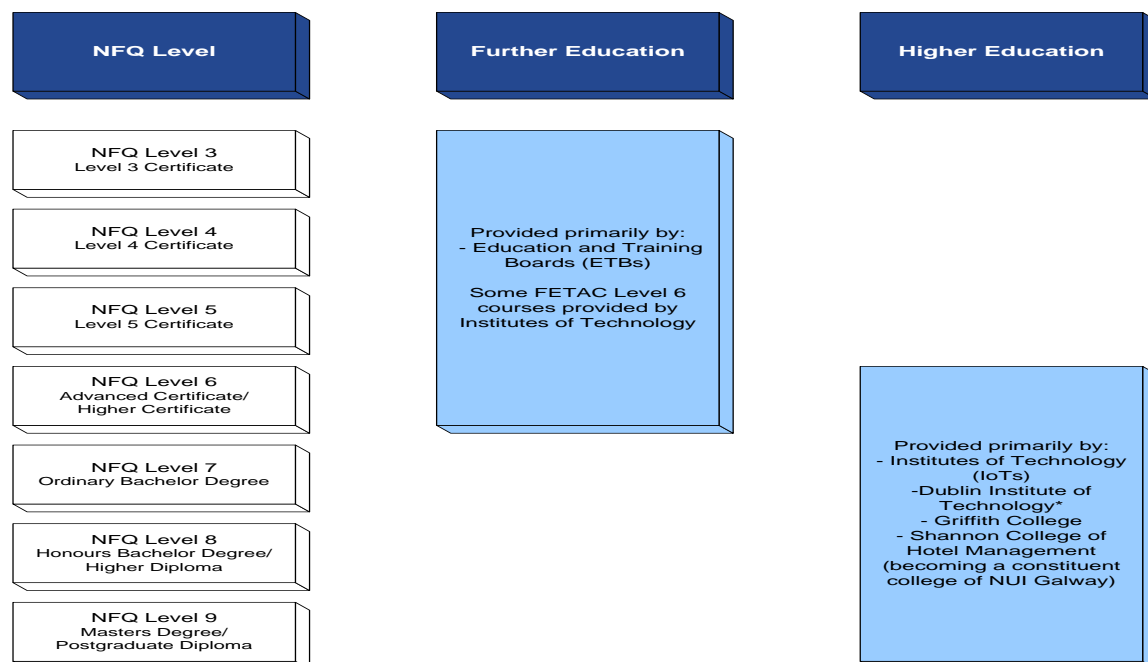
This section examines the structure of education provision in the Hospitality sector and the qualification outputs in recent years. The information that informs this analysis was provided by the Department of Jobs, Enterprise and Innovation and the Expert Group on Future Skills Needs.

4.2 Education in the Hospitality Sector

4.2.1 Range of training and education courses

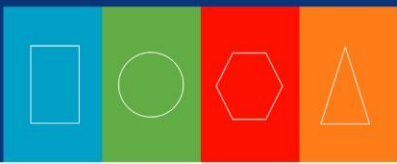
Formal education in the Hospitality sector is provided at various qualification levels via both institutes of Higher Education (HE) and Further Education and Training (FET). The HE institutes typically provide courses at National Framework of Qualifications (NFQ) Level 6 to Level 10, while institutes of FET provide courses from NFQ Level 1 to Level 6. Major Hospitality related awards are offered for NFQ Levels 3 to 9. Figure 4.1 outlines the structure of further and higher education in hospitality in Ireland. Hospitality-related HE in Ireland is provided by nine Institutes of Technology (which award degrees under delegated authority from QQI) and Dublin Institute of Technology (DIT) (which has full degree-awarding authority) and other third-level institutions including the Shannon College of Hotel Management (now in the process of becoming a constituent college of NUI Galway) and Griffith College. Education and Training Boards (ETBs) are the primary providers of FE.

Figure 4.1: Structure of Further and Higher Education in Hospitality in Ireland



Note: * Dublin Institute of Technology has full degree-awarding authority since 1998.

Source: Indecon analysis of data provided by DJEI/EGFSN



There are also additional sources of education and training in hospitality, such as:

- Training in areas such as food safety provided through the National Hygiene Partnership;¹¹
- Significant in-house and on-the-job training provided by business establishments, with reduced use of external trainers during the economic downturn;
- Online courses available internationally, e.g., Cornell School of Hotel Administration offered an 18-hour Massive Open Online Course (MOOC) free-of-charge over six weeks in early 2015 on the subject of "Introduction to Global Hospitality Management"; and,
- Recent initiatives developed or in progress by SOLAS including the Momentum Programme provision in 2014 and 2015 (aimed at the long-term unemployed) that will make available nearly 1,500 places in tourism (accommodation, food and beverage and pilot career traineeship programmes). There are also a number of hospitality-related Springboard+ programmes offered, with 83 places on courses in 2015 and 20 places planned for September 2016.

There is currently no dedicated Hospitality Skillnet although Hospitality sector employees do attend Skillnets courses and there are some hospitality training programmes being run by certain Skillnets such as South-West Gnó Skillnet. Skillnets has expressed interest in new dedicated hospitality courses if there is the necessary industry interest and financial support.

There are also a number of new initiatives in development or pilot stage. These include:

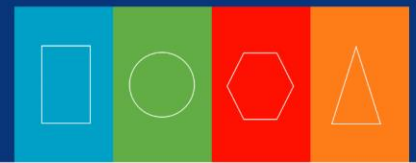
- Proposals from different consortia for five chef apprenticeship courses (one led by the Irish Hotels Federation and the Restaurants Association of Ireland; four led by IT Tralee in conjunction with a number of other IoTs), which were accepted by the Apprenticeship Council in July 2015 and now enter a detailed development phase;
- SOLAS is working with four ETBs in piloting a Level 4 hospitality career traineeship course due to commence in 2015. Occupational profiling developed in consultation with Hospitality sector employers has been central to the development of this programme; and,
- JobPath - a new initiative by the Department of Social Protection to be rolled out and available to jobseekers nationwide by October/November 2015. JobPath participants will receive intensive individual support including referrals for FE and training opportunities. It should be noted that this initiative is not restricted to the Hospitality sector.

The wide range and somewhat fragmented nature of hospitality related training and educational courses for the hospitality sector is notable.

4.2.2 Types of awards

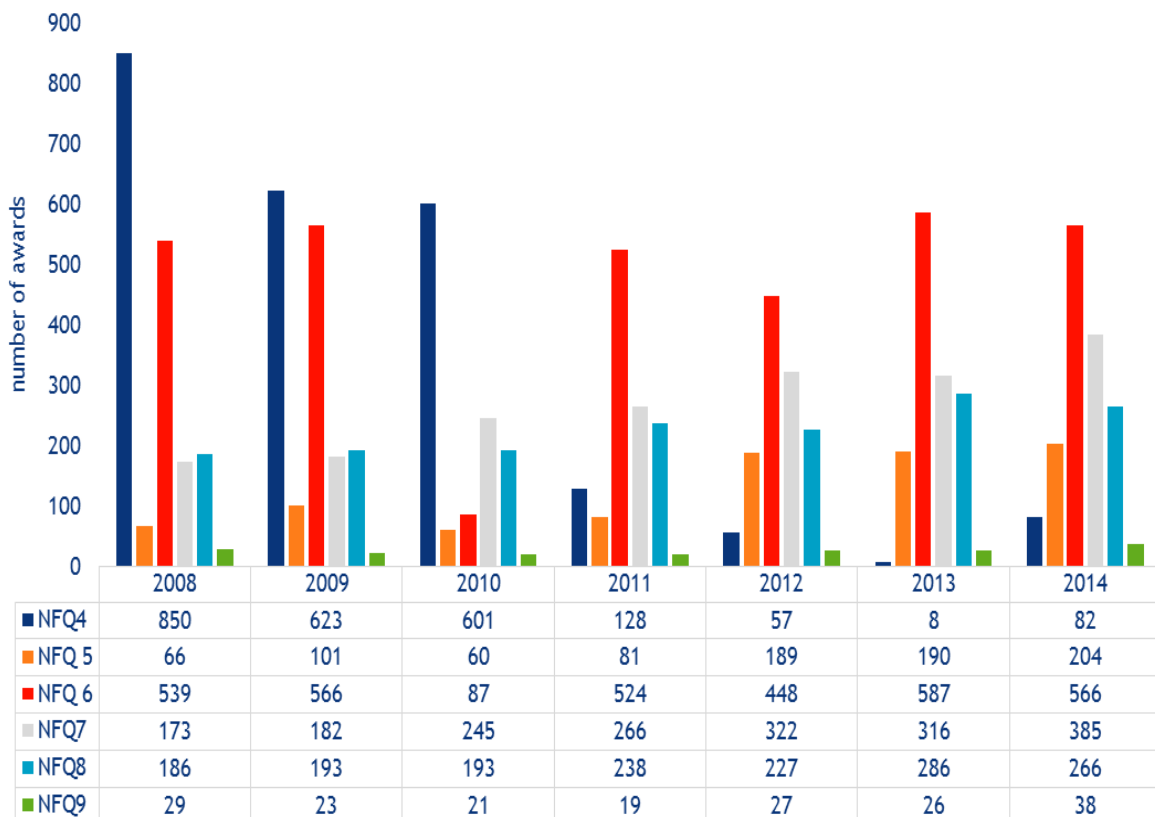
Figure 4.2 provides a summary of all major hospitality-related awards by year from 2008 to 2014, encompassing HE and FET. There has been an increase in the total number of hospitality related awards across NFQ Levels 6 to 9 since 2010, and there was a significant fall in the number of awards at NFQ Level 3 (not shown) and Level 4. In particular, awards at NFQ Level 4 fell from 850 in 2008 to eight in 2013, and rebounding upwards to 82 in 2014. The numbers include both HEA funded

¹¹ The National Hygiene Partnership is a partnership of the Environmental Health Officers Association (EHOA), Excellence Ireland Quality Association (EIQA), Fáilte Ireland, Irish Hospitality Institute (IHI), National Standards Authority of Ireland (NSAI), Food Safety Authority of Ireland (FSAI), Safefood - The Food Safety Promotion Board, Restaurant Association of Ireland (RAI), Catering Managers Association of Ireland (CMAI), Irish Hotels Federation (IHF), Teagasc, Sea Fisheries Protection Authority (SFPA) and Vintners Federation of Ireland (VFI). <http://www.nhp.ie/about-us>



institutions and Shannon College of Hotel Management and Griffith College. In particular, the latter institutions saw an increase in NFQ Level 8 awards between 2012 and 2013, and also a decline between 2013 and 2014.

Figure 4.2: Hospitality-related Major Awards 2008-2014



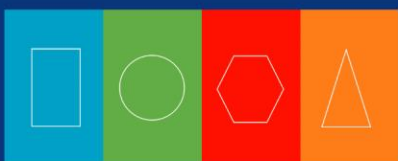
Source: EGFSN/DJEI

The types of awards granted give an indication of the nature of training undertaken in the sector. At least 38% of hospitality-related courses offered through HE are specialist management courses. Minor and special purpose awards are primarily undertaken in areas of catering and culinary, food safety and hygiene and customer care, whereas major awards are concentrated in the areas of accommodation and specialist catering and culinary arts. A full list of education institutes and courses that provide education and training for the Hospitality sector is presented in Annex 1.

4.3 Higher Education Provision

As indicated previously, higher education in hospitality and culinary studies in Ireland is provided through Dublin Institute of Technology (which has full degree-awarding authority), nine Institutes of Technology (which award degrees under delegated authority from QQI) and several private third-level institutions, including the Shannon College of Hotel Management and Griffith College.

The nine Institutes of Technology which award degrees under delegated authority from QQI and which currently provide higher education in hospitality and culinary studies are as follows:

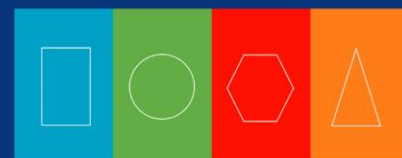


- Athlone Institute of Technology
- Cork Institute of Technology
- Dundalk Institute of Technology
- Galway-Mayo Institute of Technology
- Institute of Technology Tallaght
- Institute of Technology Tralee
- Letterkenny Institute of Technology
- Limerick Institute of Technology
- Waterford Institute of Technology

In addition, courses are provided by private colleges including the Shannon College of Hotel Management (now in process of becoming a constituent college of NUIG) and Griffith College. The full list of courses by institution and course numbers for 2013/2014 are presented in Annex 1. It is clear that there is a wide spread of hospitality courses offered across the country. In looking at the wide range of Higher Education courses offered by the various institutions, Table 4.1 gives a sample of 41 hospitality-related courses (from a total of 94 available) of the types offered. The courses range from certificate level to postgraduate degree level (i.e., from NFQ Level 6 to Level 9).

Table 4.1: Types of Courses Offered at Higher Education Level

Course Title	NFQ Level	Duration
HC in Arts in Culinary Arts	Level 6	2 years
HC in Arts in Bar Supervision	Level 6	2 years
BA in Hotel & Leisure Management	Level 7	3 years
BA in Culinary Arts	Level 7	3 years
Diploma in Restaurant Management	Level 7 (SPA)	1 year PT
Advanced Certificate in Culinary Arts (Traineeship)	FETAC 6	2 years PT
BA in Hospitality Management	Level 7	3 years
BA (Hons) in Hospitality Management	Level 8	1 year add-on
BA Arts in International Hospitality & Tourism Management	Level 7	3 years
BA (Hons) International Hospitality & Tourism Management	Level 8	4 years
BA in Culinary Arts	Level 7	1 year FT ;2 years PT
BA in International Hospitality & Tourism Management	Level 7	1 year add-on
BA (Hons) International Hospitality & Tourism Management	Level 8	1 year add-on
BA in Culinary Arts	Level 7	2 years PT
Advanced Certificate in Professional Cookery	FETAC 6	1 year
Certificate in Culinary Skills	Level 6	5 months PT

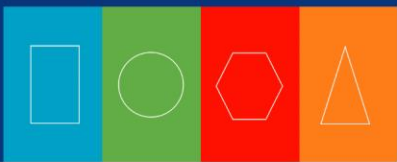


Certificate in Culinary Arts	Level 6	1 Year PT
HC in Culinary Arts (Professional Culinary Practice)	Level 6	2 years
HC in Arts in Culinary Studies	Level 6	2 years
HC Health & Nutrition for Culinary Arts	Level 6	2 years
HC in Arts in Bar & Restaurant Supervision	Level 6	2 years
Certificate in Front Office & Accommodation Operations	Level 6	5 months PT
HC in Arts in Hotel Administration	Level 6	2 years
HC in Business in Hotel Front Office Management	Level 6	2 years
HC in Hospitality Management (IHI)	Level 6	2 years PT
BBus in Culinary Arts Management	Level 7	3 years
BSc Baking & Pastry Arts Management	Level 7	3 years
Diploma in Restaurant Management	Level 7 (SPA)	1 year PT
BBus in Bar Management	Level 7	3 years
BBus in Bar & Restaurant Management	Level 7	3 years
BBus in Hotel & Catering Management	Level 7	3 years
BA in Hotel, Restaurant & Resort Management	Level 7	3 years
BA Hospitality Management	Level 7	3 years
BSc (Hons) International Hospitality Management	Level 8	4 years
BA (Hons) in Hotel Management	Level 8	4 years
BA (Hons) in Hotel & Catering Management	Level 8	4 years
BSc (Hons) in Culinary Arts with Food Technology	Level 8	4 years
MA in Culinary Arts	Level 9	2 years (Part Time)
MSc in Culinary Innovation & Food Product Development	Level 9	1 year FT; 2 years PT
MSc in Hospitality Management	Level 9	1 year FT; 2 years PT
MA in Professional Hospitality & Tourism Management	Level 9	2 years PT

Source: EGFSN/DJEI

The total number of major awards from Higher Education Authority (HEA)-funded institutions in the hotel, restaurant and catering field from 2008 to 2014 is presented in Table 4.2. This shows that there was a sharp decline from 903 to 519 in the total number of major awards in 2010 that was more than reversed in 2011 with the biggest changes occurring at NFQ Level 6. A slight overall decline occurred between 2011 and 2012 but the overall upward trend continued in 2013 and 2014. The number of awards at each NFQ Level from 6 to 9 has increased between 2008 and 2014.

There has been a slight change in the composition of major awards in hospitality-related occupations across the period 2008 to 2014. In general, the number of awards declines as the NFQ level increases, with 44% of total awards in 2014 attributed to NFQ Level 6, and only 3% to NFQ Level 9. While there is sometimes considerable annual fluctuation in the number of major awards by



NFQ level, comparing 2008 to 2014 reveals that the proportion of major awards at NFQ Levels 8 and 9 have not changed, at 21% and 3%, respectively. However, the proportion of major awards at NFQ Level 6 has declined, with a corresponding increase in the proportion of awards at NFQ Level 7.

Table 4.2: Hospitality-related Major Awards from HEA-funded Institutions 2008-2014

	2008	2009	2010	2011	2012	2013	2014
NFQ 5	32						
NFQ 6	467	505	60	506	395	565	550
NFQ 7	173	182	245	266	322	316	385
NFQ 8	186	193	193	238	227	286	266
NFQ 9	29	23	21	19	27	26	38
Total	887	903	519	1,029	971	1,193	1,239

Note: Level 6 awards include both Advanced and Higher Certificate awards made in IoTs.

Source: EGFSN/DJEI

In terms of higher education, the number of awards in hospitality-related courses has increased in recent years and there has been a shift in the composition of awards, with a higher proportion of students obtaining ordinary bachelor degrees (NFQ Level 7) and a decrease in the proportion of students obtaining advanced or higher certificates (NFQ Level 6).

4.4 Further Education and Training Provision

Further Education and Training is education provided after secondary school but not through the third-level system and is primarily provided for by ETBs.¹² The ETBs offer a number of specific hospitality-related courses. FET provision is comprised of major awards, which are the principal class of award made at a level, and minor (partial completion of outcomes for a major award), supplemental and special purpose awards.¹³ An individual could undertake a number of minor or special purpose awards in any one year.

A list of the FET institutes/ETBs in Ireland who provide hospitality-related courses is presented in Annex1. A sample of 30 of the types of courses offered by the FET institutes/ETBs in Ireland is presented in Figure 4.3. It should be noted that HE Level 6 and FET Level 6 major awards in hospitality are considered by some sector observers to be a half-level misaligned, and therefore that a student with an FET Level 6 award is not fully prepared to enter HE Level 7. This has implications for the mapping of career progression pathways that cross from FET to HE.

¹² Department of Education and Skills, Further Education and Training, <http://www.education.ie/en/The-Education-System/Further-Education-Training/>.

¹³ QQI, National Framework of Qualifications (NFQ), [Accessed: 20/05/2015 at [http://www.qqi.ie/Pages/National-Framework-of-Qualifications-\(NFQ\).aspx](http://www.qqi.ie/Pages/National-Framework-of-Qualifications-(NFQ).aspx)]

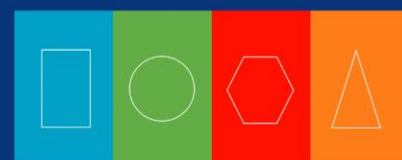
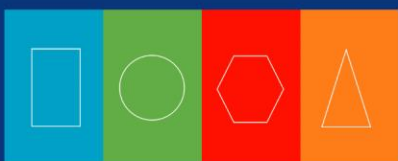


Table 4.3: Types of Courses Offered at Further Education Level

Title	NFQ Level	Duration
Hospitality Operations	Level 6	1 year
Professional Cookery	Level 6	1 year
Professional Cookery	Level 5	1 year
Professional Cookery - Back to Work Programme	Level 4	1 year Part-Time
Professional Cookery (VTOS)	Level 5	1 year
Chef-Day release Programme Catering Industry.	Level 6	2 years
Professional Cookery	Level 5	1 year
Culinary Arts	Level 5	1 year
Culinary Arts - Professional Cookery	Level 5	1 year
Hospitality Operations	Level 5	1 year
Professional Cookery	Level 5	1 year
Accommodation & Hospitality Operations	Level 5	1 year
Hotel & Catering	Level 5	1 year
Hotel, Catering and Tourism	Level 5	1 year
Hospitality Operations	Level 5	1 year
Professional Cookery	Level 5	1 year
Catering Introduction	Level 5	1 year
Professional cookery	Level 5	1 year
Culinary skills	Level 5	1 year
Reception/Office Administration	Level 5	1 year
Hospitality operations	Level 5	10 months
Hospitality Operations	Level 5	1 year
Culinary Skills	Level 4	9 months
Restaurant Operations	Level 5	1 year
Kitchen Skills	Level 4	Part-time
Culinary Skills	Level 4	1 year
Catering Support	Level 4	8 months

Source: EGFSN/DJEI

The overall number of major awards by course type from 2008 to 2014 is presented in Table 4.4. There has been a fall in the number of FET major awards from 956 in 2008 to 302 in 2014, largely driven by the fall in awards at NFQ Level 4. A change in the mix of awards by type is also observed with a notable decline in the number of awards in the restaurant and bar study field, from 423 major awards in 2008 to none in 2013 and 2014. Restaurant and bar, and catering and culinary are



the fields which have been most significantly affected by the decline in awards at NFQ Level 4. While it seems that this decline has been partly offset by an increase in the number of awards at NFQ Level 5 for catering and culinary, there has been no such increase for restaurant and bar.

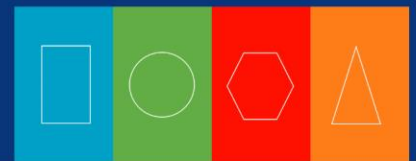
Table 4.4: Further Education Hospitality-Related Major Awards 2008-2014

	2008	2009	2010	2011	2012	2013	2014
Accommodation Services							
NFQ 4	23	12	10	-	16	2	0
NFQ 5	-	16	0	-	101	108	58
NFQ 6	10	13	12	-	14	0	0
Total	33	41	22	-	131	110	58
Catering and Culinary							
NFQ 4	399	330	267	72	41	6	82
NFQ 5	-	47	47	81	0	82	146
NFQ 6	60	34	15	11	39	22	16
Total	459	411	329	164	80	110	244
Restaurant and Bar							
NFQ 4	231	281	324	13	0	-	0
NFQ 5	8	38	13	0	4	-	0
NFQ 6	2	2	-	7	0	-	0
Total	423	321	337	20	4	-	0
Customer Care, Hospitality							
NFQ 4	15	-	-	-	0	-	0
NFQ 5	26	-	-	-	0	-	0
NFQ 6	-	12	-	-	0	-	0
Total	41	12	-	-	0	-	0
Total							
NFQ 4	850	623	601	85	57	8	82
NFQ 5	34	101	60	81	105	190	204
NFQ 6	72	61	27	18	53	22	16
Total	956	785*	688**	184***	215	220	302

Note: This table excludes IoT awards. *Mainly Fáilte Ireland training. **461 Fáilte Ireland training. ***Of which 60 Fáilte Ireland training.

Source: EGFSN/DJEI

The number of minor and/or special purpose awards achieved in hospitality-related study fields, is presented in Table 4.5. Caution must be exercised when considering totals however; as an individual could achieve more than one minor or special purpose award in any given year and so there is a possibility of double counting of individuals in the totals. Customer Care, Hospitality, Catering and Culinary, and Food Safety and Hygiene made up these awards in 2014. In recent years, the majority of minor and special purpose awards are at NFQ Level 5 (60.3% of all minor and special purpose awards in 2014). For catering and culinary however, the number of awards is more evenly spread across NFQ levels, with the highest number of awards at NFQ Level 3. In the context of the decline in the number of major awards for restaurant and bar outlined previously, it is interesting to note that there has been an increase in the number of minor and special purpose awards in this field

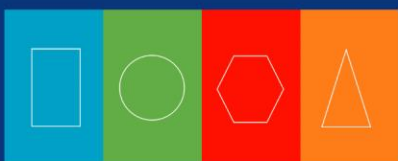


between 2009 and 2014. However, this increase is not of sufficient magnitude to counteract the decrease in major awards, indicating that there has been a significant decline in further education in this field. There has also been a significant decrease in the number of awards for accommodation services and catering and culinary. This decline is considered in the context of a modest increase in the number of major awards for accommodation services and a significant decrease in the number of major awards from catering and culinary.

Table 4.5: FET Hospitality related Minor and Special Purpose Awards 2008-2014

2009		2012	2013	2014
Accommodation Services				
NFQ 3	693	1	1	26
NFQ 4	-	4	5	9
NFQ 5	57	45	177	138
NFQ 6	-	15	22	7
Total	750	65	205	180
Catering and Culinary				
NFQ 3	2,723	402	758	697
NFQ 4	183	300	359	475
NFQ 5	251	90	312	556
NFQ 6	2	-	21	117
Total	3,159	792	1,450	1,845
Restaurant and Bar				
NFQ 3	99	-	22	141
NFQ 4	34	-	-	0
NFQ 5	0	40	28	34
NFQ 6	18	-	-	6
Total	151	40	50	181
Food Safety and Hygiene				
NFQ 3	-	354	518	384
NFQ 4	697	1,126	776	0
NFQ 5	122	2,378	1,670	1,013
NFQ 6	36	76	333	163
Total	855	3,934	3,297	1,560
Customer Care, Hospitality				
NFQ 3	530	-	22	0
NFQ 4	104	2	2	732
NFQ 5	1,580	2,612	3,130	2,525
NFQ 6	71	157	162	50
Total	2,285	2,771	3,316	3,307
Total				
NFQ 3	4,045	757	1,321	1,248
NFQ 4	1,018	1,432	1,142	1,216
NFQ 5	2,010	5,165	5,317	4,266
NFQ 6	127	248	538	343
Total	7,200	7,602	8,318	7,073

Source: EGFSN/DJEI



The preceding tables have demonstrated that there has been a significant decrease in the number of major awards from further education, largely driven by a decline in the number of awards at NFQ Level 4. For accommodation services, a slight increase is observed in the number of major awards but a significant decrease is observed in the number of minor and special purpose awards, primarily at NFQ Level 3. Further education in catering and culinary has seen a significant decline in the number of major, minor and special purpose awards in recent years. Similarly, there has been a decline in the number of awards in the restaurant and bar field, with no major awards in 2014 (compared to 423 awards in 2008) and only a modest increase in the number of minor and special purpose awards. There has been a significant increase in the number of minor and special purpose awards in the fields of food hygiene and customer care and hospitality.

4.4.1 Food Safety Initiatives

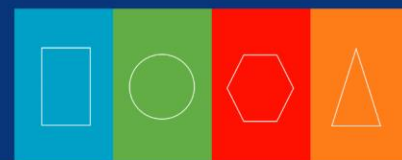
The National Hygiene Partnership (NHP) has developed a programme titled “The Management of Food Safety - The Essential Guide to HACCP Compliance” which aims to improved food safety standards nationally. The programme has its foundation in EU legislation (Regulation (EC) 852/2004) and guidelines outlined in the National Standards Authority of Ireland publications (I.S. 340:2007 “Hygiene in the Catering Sector” and I.S. 341: 2007 “Hygiene in Food Retailing and Wholesale”). In relation to the Hospitality sector, the programme is intended for personnel with responsibility for management of food operations such as catering managers, supervisors, executive and head chefs as well as personnel and training officers in large scale hospitality and catering organisations and college lecturers in a relevant field. Table 4.6 presents the number of participants and courses offered under this programme from 2003 to 2014. The number of courses and participants has declined across the period.

Table 4.6: Courses and Participants on the "Management of Food Safety - The Essential Guide to HACCP Compliance" Programme

Year	Number of Courses	Number of Participants
2003	55	746
2004	47	603
2005	56	724
2006	49	635
2007	64	728
2008	48	642
2009	35	403
2010	40	402
2011	29	357
2012	22	305
2013	23	301
2014	26	273

Source: DJEI/EGFSN

The National Hygiene Partnership additionally offers alternative programmes such as Essential Food Safety and Hygiene Skills for personnel employed in various industries in the hospitality sector,



available in both taught and e-learning formats. The e-learning courses offered by the NHP are Level 1 Essential Food Safety and Hygiene Skills for general food workers, bed and breakfast operators, health sector food workers and Fáilte Ireland-approved pubs. The National Hygiene Programme also offers a Food Safety Training Programme for Lecturers and Chefs teaching hospitality-related courses in Institutes of Technology.

4.5 Future Plans and Developments for Education Provision

The likely award outputs over next five to ten years will affect the extent to which demand can be supported by adequate skill provision. It has been observed in previous sections that there has been increased output from higher education in recent years but that the number of Further Education and Training level major awards has declined significantly, driven by a fall in the number of awards at NFQ Level 4. As outlined previously, there are a number of plans and developments for education and training provision in the Hospitality sector.

4.5.1 Additional ETB Courses

Firstly, there are four new ETB courses due to commence in 2015, the details of which are presented below. The NFQ level of these new courses is not available but it is interesting to note that three of the four courses are in the catering and culinary field.

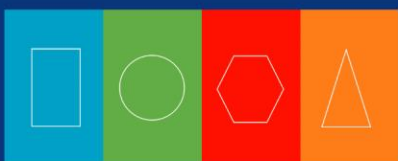
Table 4.7: Commencing ETB Courses

Course title	Provider	Region	NFQ level	Duration and starting Date
Culinary Arts	Kerry ETB Training Centre	Tralee Mid-West	n/a	20 weeks Fulltime Commencing 18/05/2015
Hospitality operations	The Food Hub	Drumshanbo Co. Leitrim	n/a	40 weeks fulltime Commencing 02/11/2015
Food Preparation and Cooking Culinary Arts	Kerry ETB Training Centre	Tralee Co. Kerry	n/a	20 weeks commencing 18/5/2015
Food Preparation and Cooking Culinary arts	Kerry ETB Training Centre	Based in Dingle Co. Kerry	n/a	21 weeks commencing 12/10/2015

Source: DJEI/SOLAS

In addition, a pilot Career Traineeship in Hospitality is due to begin in September 2015 with an initial intake of 20 trainees per ETB. Four ETBs (Cavan-Monaghan, Kerry, Mayo-Sligo-Leitrim and Limerick)¹⁴ are collaborating with SOLAS and piloting the programme which will involve off-the-job training in an ETB or an ETB-approved Training Centre as well as hands-on learning in host companies. The learning phase aims to provide participants with a planned, structured and supportive experience, which takes place under the normal operational conditions of the host companies. Qualifications from the programme will be accredited at NFQ Level 4/5.

¹⁴ Pilot course in Laois-Offaly to be confirmed.



4.5.2 Hospitality Apprenticeships

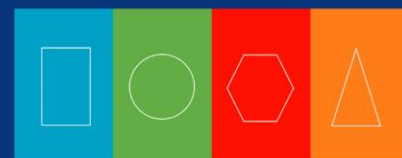
In July 2015, the Apprenticeship Council accepted proposals for five new Hospitality sector apprenticeship programmes for chefs. A consortium led by the Irish Hotels Federation and the Restaurants Association of Ireland will develop one programme for Commis Chefs. IT Tralee with involvement from other IoTs will lead the development of four programmes for Sous Chefs, Chefs de Partie, Commis Chefs and Executive Chefs. It is anticipated these proposals will deliver approximately 130-150 chef-related apprenticeships. Four new ETB courses were due to commence in 2015. There is currently no dedicated Hospitality Skillnet but there are some hospitality training programmes being run by certain Skillnets such as South West Gnó Skillnet.

4.5.3 SOLAS Momentum Programme

The SOLAS Momentum Programme, which is targeted at individuals who have been unemployed for more than a year and are seeking work, ran in 2013 and 2014, and a second stream is underway for the year 2014/2015. The programme offers participants training free of charge while they maintain their social welfare allowance and courses include diplomas in tourism management, professional food and beverage service, professional cookery, culinary skills and hospitality careers. Courses last between 23 and 45 weeks in duration. Table 4.8 gives an overview of the Momentum courses and the numbers participating in each course in 2013/14. The courses were offered in hospitality and tourism, as well as professional cookery.

Table 4.8: Momentum Programmes 2013/14

Providers	Proposal Title	Area	Number of places scheduled	Starters
Barrow Consultancy and Training Ltd	Certificate in Hospitality and Tourism	Bray, Co Wicklow	20	20
Barrow Consultancy and Training Ltd	Certificate Hospitality and Tourism	Kilkenny City	21	14
Barrow Consultancy and Training Ltd	Certificate Hospitality and Tourism	Wexford	24	24
Barrow Consultancy and Training Ltd	Certificate Hospitality and Tourism	Waterford City	21	20
Barrow Consultancy and Training Ltd	Certificate in Hospitality and Tourism	Carlow Town	25	25
Barrow Consultancy and Training Ltd	Certificate Hospitality and Tourism	Naas, Co Kildare	23	23
Cavan & Monaghan ETB	Hospitality Operations - Professional Cookery	Cavan	38	38
CPL Training Ltd T/A Nifast	Tourism Hospitality Careers	Portlaoise, Co Laois	24	26
CPL Training Ltd T/A Nifast	Tourism & Hospitality Careers	Navan, Co Meath	24	20
Janet Tumulty T/A New Links	Train to Work Tourism &	Waterford	24	23



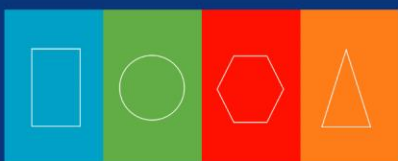
Training Solutions	Hospitality	City		
Janet Tumulty T/A New Links Training Solutions	Train to Work Tourism & Hospitality	Waterford	24	22
Janet Tumulty T/A New Links Training Solutions	Train to Work Tourism & Hospitality	Cork City	24	25
Kerry ETB	Professional Cookery - Front of House	Killarney, Co Kerry	25	24
Kerry ETB	Professional Cookery - Front of House	Killarney, Co Kerry	23	22
Northern Ireland Trade Union Educational & Social	Introduction to Tourism	Sligo	24	20

Source: SOLAS/DJEI

Table 4.9 provides a similar overview of Momentum courses in 2014/15. There is an even spread of course offerings across the country. The courses in 2014/15 concentrate on tourism and hospitality careers, culinary skills and professional food and beverage service.

Table 4.9: Momentum Programme 2014/15

Momentum Programme 2014/15	Proposal Title	Area	Number of participant scheduled	Starters
Accountancy & Business College Ireland Ltd t/a Dub	Diploma in Tourism Management	Dublin 2	60	21
Cavan & Monaghan ETB	Hospitality Operations - Professional Cookery	Monaghan (urban)	29	N/a
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Kilbarrack	24	25
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Naas, Co Kildare	24	23
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Sligo	24	23
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Clonmel	24	24
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Dublin City	24	23
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Dun Laoghaire	24	20
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Galway City	24	21
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Arklow, Co Wicklow	24	21
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Limerick City	24	24
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Monaghan	24	23
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Blanchardstown	24	21
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Thurles	24	18
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Ennis, Co Clare	24	26
CPL Training Ltd T/A Nifast	Tourism & Hospitality C	Swords	24	25
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Athlone East	24	19
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Galway	24	21
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Cavan	24	22
CPL Training Ltd T/A Nifast	Tourism & Hospitality	Tallaght	24	24



Momentum Programme 2014/15	Proposal Title	Area	Number of participant scheduled	Starters
Fast Track Into Information Technology Ltd T/A	Culinary Skills	Finglas	36	N/a
Fast Track Into Information Technology Ltd T/A	Culinary Skills	Finglas	36	36
Kilmuckridge Centre of Further Education	Culinary Skills Training	Wexford	12	12
Kilmuckridge Centre of Further Education	Culinary Skills Training	Gorey, Co Wexford	12	12
SDMG Ltd T/A Swilly Group	Diploma Professional Food & Beverage Service	Limerick City	24	22
SDMG Ltd T/A Swilly Group	Diploma Professional Food & Beverage Service	Galway	24	22
SDMG Ltd T/A Swilly Group	Diploma Professional Food & Beverage Service	Westport, Co Mayo	24	16
SDMG Ltd T/A Swilly Group	Diploma Professional Food & Beverage Service	Letterkenny	24	24

Source: SOLAS/DJEI

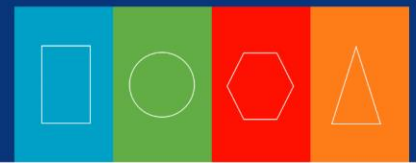
4.5.4 Springboard+ Courses

There are a number of hospitality related Springboard+ programmes offered. Such courses at various NFQ levels are primarily targeted at jobseekers with a previous history of employment. There are 83 places on hospitality-related courses in 2015 and 20 places planned for September 2016.

Table 4.10: Springboard+ Hospitality Provision

Provider	Course Title	NFQ Level	ECTS credits	Places
Year 2013				
IT Tralee	Certificate in Culinary Skills	Level 6	30	49
Year 2014				
IT Tralee	Certificate in Culinary Skills	Level 6	30	15
Year 2015				
Dublin Institute of Technology	Higher Diploma in Hospitality Management	Level 8	60	25
Dublin Institute of Technology	Higher Certificate in Hotel and Restaurant Supervision	Level 6	60	20
Dundalk Institute of Technology	Certificate in Hospitality Operations (Sept 2015 intake)	Level 6	20	20
IT Tralee	Certificate in Culinary Skills	Level 6	30	18
Year 2016				
Dundalk Institute of Technology	Certificate in Hospitality Operations (Sept 2016 intake)	Level 6	20	20

Source: EGFSN/DJEI



4.5.6 Other Courses

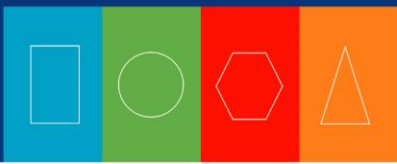
The School of Food in Kilkenny has recently launched a new chef training course which is due to begin in October and is currently accepting applications.¹⁵ The course is titled “Professional Cookery” and will lead to a QQI Level 5 award. The duration of the course is 34 weeks full-time and the course will comprise three days in the classroom and kitchen and two days in a professional kitchen each week. The programme is part-funded by Fáilte Ireland and LEADER.

4.6 Summary of Key Findings

In this section, the current situation in relation to the provision of education and training in the Irish hospitality sector has been considered. The key findings are as follows:

- Formal education and training in the hospitality sector are conducted through further and higher education, however, significant training is provided in-house;
- Hospitality-related higher education is provided by 10 Institutes of Technology and other 3rd level institutions including the Shannon College of Hotel Management and Griffith College;
- Further education is primarily provided by Education and Training Boards (ETBs);
- Online training is also available in Ireland for example as part of the IT Tralee Trainee Manager Development Programme and internationally from hospitality institutes such as Cornell School of Hotel Administration;
- There has been an increase in the total number of major awards across NFQ Levels 4 to 9 between 2010 and 2014;
- There has been increased output from higher education in recent years but the number of major awards from further education has declined significantly, driven by a fall in the number of awards at NFQ Level 4;
- Significant decrease in the number of awards from further education in the fields of catering and culinary/ restaurant and bar;
- The likely award outputs over next five to ten years will affect the extent to which demand can be supported by adequate skill provision;
- In terms of new developments in education provision, there are five new ETB courses due to commence in 2015, as well as a pilot Career Traineeship programme in hospitality being run by SOLAS in collaboration with four ETBs, and a second stream of the SOLAS Momentum Programme; and,
- In planning future education and training provision, it will also be important to factor in the evolving demographic profile of prospective students, including the potential increased role of the ‘grey’ workforce and other demographic groups.

¹⁵ Digby, M.C. (2015, August 19), “Yes chef! New course to tackle kitchen staffing crisis”, The Irish Times. <http://www.irishtimes.com/life-and-style/food-and-drink/yes-chef-new-course-to-tackle-kitchen-staffing-crisis-1.2322157>



5. Scenarios for Hospitality Skills Demand

5.1 Introduction

This section examines alternative scenarios for the evolution of hospitality skills demand over the six-year period 2015 to 2020. The assessment identifies for each scenario the breakdown of anticipated skill requirements by occupational category that result from expansionary demand (due to economic growth) on the one hand, and replacement demand required to meet ongoing exit of staff from existing employment in the sector on the other. The analysis is then combined with assumptions with regard to prospective future education and training output, to assess the possible implications for skills supply of new entrants to hospitality occupations coming through the education and training sector. Further to this, the assessment considers a set of illustrative scenarios, at the level of specific occupational categories, with regard to potential sources of new skills supply that could address identified skill demand.

5.2 Methodological Approach

The assessment presents two alternative scenarios based on different assumptions for growth in Hospitality sector employment in Ireland between 2015 and 2020. Scenario 1 models growth assuming that employment in the Hospitality sector grows in line with the employment targets in the Government's Tourism Policy Review¹⁶ document; Scenario 2 projects growth using employment growth forecasts from the recovery scenario in the latest ESRI Medium-Term Review.¹⁷

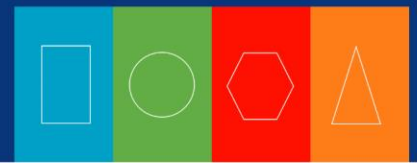
Inputs to these scenarios include:

- Baseline employment levels for key occupational categories for 2014;
- Employment targets from the Government's Tourism Policy Review document;
- ESRI Medium-Term Review "Recovery Scenario";
- Data from Indecon survey of hospitality businesses on likely evolution of relative demand for hospitality-related occupations from 2015-2020; and,
- Recent evidence on Replacement Rates prevailing in hospitality-related occupations provided by the SOLAS SLMRU.

What follows is a detailed discussion of the methodology employed to forecast total employment and employment by occupation for each scenario. Following this discussion of the methodological approach the findings for each scenario are outlined before then examining potential sources of skilled labour to address the emerging skills shortfalls identified.

¹⁶ "People, Place And Policy Growing Tourism To 2025" Department of Transport, Tourism and Sport. March 2015. <http://www.dttas.ie/sites/default/files/publications/tourism/english/people-place-and-policy-growing-tourism-2025/people-place-and-policy-growing-tourism-2025.pdf>

¹⁷ "Medium Term Review: 2013-2020" Economic and Social Research Institute, July 2013. <https://www.esri.ie/UserFiles/publications/MTR12.pdf>



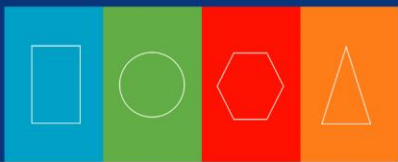
The methodological approach applied to forecasting skills demand in the hospitality sector for both scenarios involves forecasting total demand for labour in the hospitality sector using headline metrics such as the employment targets in the Government's Tourism Policy Review and the employment level implied by analysis of the Medium-Term Review. Once total employment has been forecast, the Indecon survey of employers in the Hospitality sector is used to forecast the likely breakdown of employment demand by occupation.

The first scenario for skills demand to 2020 (Scenario 1) assumes that the targets set out in the Government's tourism policy review document for employment in the Tourism sector by 2025 are on course to be met. It is assumed that the annual rate of employment growth required to meet the target for 2025 is met in each year between 2015 and 2020, the timeframe for this analysis. The tourism policy review estimates total employment in the Tourism sector at around 200,000 jobs. The SLMRU estimates that 160,000 of these jobs are in the Hospitality sector. The Government's tourism policy review targets 250,000 tourism jobs by 2025. Our scenario assumes that employment in the hospitality sector grows in proportion to total employment in the tourism industry as a whole. With this assumption in mind, Scenario 1 thus forecasts total employment in the Hospitality sector of over 179,000 by 2020, an increase of 13.6% from the 2014 level.

Scenario 2 assumes that employment in the Hospitality sector will grow in line with employment growth forecasts in the ESRI Medium-Term Review (MTR) Recovery Scenario. The MTR does not forecast growth at a sufficiently sectorally disaggregated level to accurately discern a projected growth rate for the Hospitality sector. In order to obtain an estimate for forecast growth in the hospitality sector, an estimate is made of what portion of forecast growth in the "Other Market Services" sector of the MTR forecasts is accounted for by the Accommodation and Food Services sector, a proxy for the Hospitality sector. The "Other Market Services" sector is comprised of the Accommodation and Food Services sector, Financial, Insurance and Real-Estate related services, Information and Communication services, Professional, Scientific and Technical activities and Other NACE service activities. An estimate of the employment growth in the Accommodation and Food services sector is made by using employment data from the QNHS to estimate the average size of the accommodation and food services sector relative to the other sectors making up the "Other Market Services" sector in the MTR. Having done this, Indecon then analyses what percentage of employment growth across the "Other Market Services" sector has been accounted for, on average, over recent years by the Accommodation and Food services sector.

The average employment growth accounted for by the Accommodation and Food Services sector between 2008 and 2014 is then applied to the forecast employment growth in the "Other Market Services" sector in the MTR recovery scenario in order to obtain an estimate of likely future employment growth in the Hospitality sector. The average employment growth accounted for by the accommodation and food services sector was 31% of total employment growth in the sectors making up "Other Market Services" between 2008 and 2014. This calculation suggests that employment in the Hospitality sector will grow by 6.4% between 2015 and 2020.

In forecasting the breakdown of occupational level demand within this 13.6% increase for Scenario 1 and 6.4% increase for Scenario 2, the responses to the Indecon survey of businesses in the



Hospitality sector are used. This survey asked respondents across the sector how they would forecast their demand for different occupations over the coming years. With the survey data as a guide to the likely relative demand for labour in different occupations in the sector, both scenarios assume that occupational demand will grow proportionately to the growth implied by the survey respondents. It should be noted that while every effort has been made to differentiate across different occupations within the sector, there remains a substantial number of jobs in the Hospitality sector that Indecon was unable to accurately assign to specific occupations. In forecasting the growth in demand for jobs in this “Other AFS Employment” category, it is assumed that demand for labour will grow in line with the growth rate for the Hospitality sector as a whole as indicated in the survey evidence.

5.3 Scenarios for Hospitality Skills Demand

Table 5.1 outlines the forecast labour demand for each occupation by 2020 and the increase in employment from the 2014 level under Scenario 1. Under this Scenario total employment in the Hospitality sector is forecast to reach 179,534 by 2020, an increase of 13.6% from the 2014 level. Occupations for which demand is projected to expand most significantly include chefs, cooks, kitchen and catering assistants and waiters and waitresses.

Table 5.1: Projections for Employment in Hospitality-related Occupations to 2020 - Scenario 1

Occupation	Projected Employment in 2020	% Increase from 2014
Functional managers and directors n.e.c.	3,270	9.0%
Hotel and accommodation managers and proprietors	9,146	11.0%
Restaurant and catering managers and proprietors	6,990	11.0%
Publicans and managers of licensed premises	3,673	6.9%
Receptionists	3,428	11.0%
Other Admin Staff in the Hospitality and Food Sector	3,368	8.3%
Chefs	27,470	14.7%
Cooks	3,711	16.0%
Catering and bar managers	6,248	9.2%
Caring, Leisure, other services	4,928	11.8%
Sales & Customer Service	6,077	10.4%
Cleaners and domestics	4,294	12.7%
Kitchen and catering assistants	26,903	15.7%
Waiters and waitresses	32,364	17.6%
Bar staff	21,222	13.4%
Other elementary service occupations in the sector	3,551	15.1%
Other AFS Employment	12,891	10.7%
Total Employment	179,534	13.6%

Note: n.e.c. signifies not elsewhere classified.

Source: Indecon Analysis

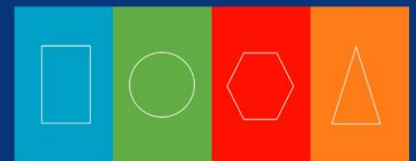


Table 5.2 outlines the projected growth in each occupation under Scenario 2. Under this Scenario, total employment in hospitality is projected to reach 167,977 by 2020. Similarly to Scenario 1, the occupations forecast to see the highest growth in demand for labour are chefs, cooks, kitchen/catering assistants and waiters/waitresses.

Table 5.2: Projections for Employment in Hospitality-related Occupations to 2020 - Scenario 2

Occupation	Projected Employment in 2020	% Increase from 2014
Functional managers and directors n.e.c.	3,125	4.2%
Hotel and accommodation managers and proprietors	8,661	5.1%
Restaurant and catering managers and proprietors	6,619	5.1%
Publicans and managers of licensed premises	3,546	3.2%
Receptionists	3,245	5.1%
Other Admin Staff in the Hospitality and Food Sector	3,230	3.8%
Chefs	25,581	6.8%
Cooks	3,437	7.4%
Catering and bar managers	5,967	4.2%
Caring, Leisure, other services, SOC 6	4,648	5.5%
Sales & Customer Service SOC 7	5,769	4.8%
Cleaners and domestics	4,034	5.9%
Kitchen and catering assistants	24,946	7.3%
Waiters and waitresses	29,760	8.2%
Bar staff	19,879	6.2%
Other elementary service occupations in the sector	3,301	7.0%
Other AFS Employment	12,228	4.9%
Total Employment	167,977	6.3%

Note: Totals may not exactly equal the sum of components due to rounding differences in the underlying data. n.e.c. signifies not elsewhere classified.

Source: Indecon Analysis

Table 5.3 provides a further breakdown of the changes in labour demand under Scenario 1. Column A shows the forecast skills demand due to the estimated expansion of the sector over the period. Column B shows the forecast skills demand due to estimated replacement demand over the six-year period 2015 to 2020 for each occupation. Column C represents the projected total gross skills demand for each occupation by 2020, the sum total of columns A and B.

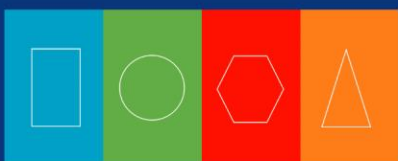


Table 5.3: Breakdown of Projected Skills Demand over period 2015-2020 by Expansion and Replacement Demand - Scenario 1

	Requirement Due to Demand Growth - 2015-2020	Requirement Due to Replacement Demand- 2015-2020	Projected Total Skills Demand Requirement - 2015-2020
<i>Occupation</i>	<i>A</i>	<i>B</i>	<i>C (A+B)</i>
Functional managers and directors n.e.c.	270	2,121	2,391
Hotel and accommodation managers and proprietors	904	3,733	4,637
Restaurant and catering managers and proprietors	691	6,147	6,838
Publicans and managers of licensed premises	237	2,058	2,295
Receptionists	341	2,805	3,145
Other Admin Staff in the Sector	257	2,785	3,041
Chefs	3,522	9,347	12,869
Cooks	511	1,257	1,768
Catering and bar managers	524	5,894	6,418
Caring, Leisure, other services	522	2,950	3,472
Sales & Customer Service	573	5,185	5,758
Cleaners and domestics	484	2,874	3,358
Kitchen and catering assistants	3,649	23,477 (8,970)*	27,126 (12,619)*
Waiters and waitresses	4,855	42,494 (5,252)*	47,348 (10,107)*
Bar staff	2,504	28,819 (13,702)*	31,322 (16,207)*
Other elementary service in the sector	465	4,201	4,666
Other AFS Employment	1,236	9,897	11,134
Total	21,544	156,042 (89,179)*	177,586 (110,723)*
% of Total	12.1% (19.5%)*	87.9% (80.5%)*	100%

Notes: (1) Totals may not exactly equal the sum of components due to rounding differences in the underlying data. (2) n.e.c. signifies not elsewhere classified.

*Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Source: Indecon Analysis

Table 5.4 provides a similar detailed breakdown of forecast labour demand in respect of Scenario 2.

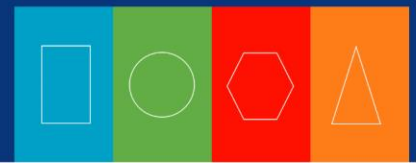


Table 5.4: Breakdown of Projected Skills Demand over period 2015-2020 by Expansion and Replacement Demand - Scenario 2

	<i>Requirement Due to Demand Growth - 2015-2020</i>	<i>Requirement Due to Replacement Demand - 2015-2020</i>	<i>Projected Total Skills Demand Requirement - 2015-2020</i>
Occupation	A	B	C (A+B)
Functional managers and directors n.e.c.	125	2,065	2,190
Hotel & accommodation managers/ proprietors	419	3,615	4,034
Restaurant & catering managers /proprietors	320	5,953	6,273
Publicans and managers of licensed premises	110	2,016	2,126
Receptionists	158	2,716	2,874
Other Admin Staff in Sector	119	2,717	2,836
Chefs	1,632	8,961	10,594
Cooks	237	1,201	1,438
Catering and bar managers	243	5,736	5,979
Caring, Leisure, other services	242	2,850	3,092
Sales & Customer Service	266	5,028	5,294
Cleaners and domestics	224	2,784	3,008
Kitchen and catering assistants	1,691	22,450 (8,578)*	24,141 (10,269)*
Waiters and waitresses	2,250	40,431 (4,998)*	42,681 (7,248)*
Bar staff	1,160	27,727 (13,184)*	28,887(14,345)*
Other elementary service occupations	216	4,023	4,239
Other AFS Employment	573	9,594	10,167
Total	9,986	149,867 (86,012)*	159,853(96,006)*
% of Total	6.2% (10.4%)*	93.8% (89.6%)*	100%

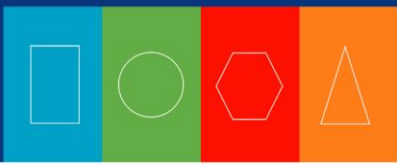
Notes: (1) Totals may not exactly equal the sum of components due to rounding differences in the underlying data. (2) n.e.c. signifies not elsewhere classified.

*Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Source: Indecon Analysis

The replacement rate used in the analysis for both Scenarios 1 and 2 is calculated using data from the most recent National Skills Bulletin on the historical replacement rates experienced in each occupation. The replacement rates used in our analysis are averages of the published replacement rates for each occupation between 2012 and 2014 (to smooth annual fluctuations in the data).

Overall, under the two scenarios analysed, there is anticipated to be a skills demand across hospitality occupations amounting to between 96,006 and 110,723 persons when annual inflows of students into waiters/waitresses, bar and kitchen/catering staff occupations are taken into account. The analysis implies that while the demand for labour in each occupation due to the growth of the Hospitality sector may only increase by the total in column A over the six-year period from 2015 to



2020, there will be an additional skills demand due to people exiting each occupation each year. An important feature of the above scenarios concerns the finding that the majority (approximately 80-90%) of the projected overall gross skills demand in the Hospitality sector results from the high level of replacement demand.

5.4 Assessment of Potential Sources to Address Skills Demand

The previous sections of this chapter have outlined the methodology used in forecasting employment demand in the Hospitality sector, discussed the findings of the forecasting and illustrated the likely skill demand in hospitality-related occupations arising from demand growth and replacement requirements. This section illustrates the potential impact of a number of different sources of future supply on the skills demand projected above.

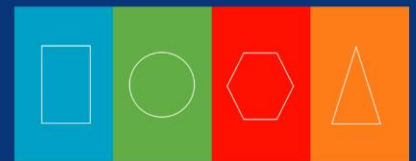
5.4.1 Education and training output

A key ongoing source of skills supply relates to education and training sector output. Indecon estimates the likely inflow of skilled workers from these institutions and assesses the impact that this inflow will have on projected skill demand. For the purposes of forecasting the likely flow of skilled labour from education it is assumed that the number of people gaining qualifications from both the Higher Education Authority and other awarding bodies in 2014 is replicated each year between 2015 and 2020. Indecon has attempted to match the qualifications in terms of National Framework of Qualifications level and the area in which the qualification was achieved with the relevant occupations within the Hospitality sector.

For a number of occupations, including waiters/waitresses, kitchen/catering assistants, and bar staff, it has not been possible to identify assumptions for annual higher or further education output. Such supply would include output from the further education sector, including hospitality-related minor and special purpose provision and relevant Momentum programme provision.

However it is noted that to the extent that new entrants come through the education and training sector, other factors being equal this would lower the estimated skill demand shortfalls of kitchen and catering assistants. In addition, limited data availability on the movements of people from inactivity and outside the labour force into hospitality related occupations also limits the scope of both Scenario 1 and Scenario 2 to account for natural countervailing increases in the labour supply to the Hospitality sector.

This absence of comprehensive data on annual new entrants from education and training across occupational categories may result in some overestimation of projected skills demand shortfalls between 2014 and 2020. However, these scenarios are broadly indicative of the occupations in which skills shortfalls are likely to be most acutely felt. This issue is important in considering the projected skills demand shortfalls in the relatively low skilled occupations with high replacements rates, such as waiters and waitresses and bar staff. For both scenarios, in respect of those occupations for which relevant data is available on entrants from education and training, it can be



observed that the forecast skills demand shortfall is reduced when these new entrants are accounted for in the analysis.

Table 5.5 illustrates the likely impact on the projected skills demand of new entrants to the labour force from education and training over the six-year period from 2015 to 2020 for Scenario 1.

Table 5.5: Accounting for Supply of Skills between 2015 and 2020 - Scenario 1

Broad Categories	Occupations	Projected Gross Skills Demand - (A)	Estimated New Entrants from Education/ Training - (B)*	Projected Skill Demand Shortfall accounting for entrants from Education/ Training - (C=A-B)
Accommodation Managers	Functional managers and directors n.e.c.	7,028	3,120	3,908
	Hotel and accommodation managers and proprietors			
	Other Managerial roles in the Hospitality Sector			
Food Managers	Restaurant and catering managers and proprietors	15,551	875	14,676
	Publicans and managers of licensed premises			
	Catering and bar managers			
	Other Admin Staff in the Hospitality and Food Sector			
Skilled Food Preparation	Chefs	14,637	5,446**	9,191
	Cooks			
	Other Skilled Trades in Sector			

* Assuming quantum of education and training output in relevant disciplines remains constant at 2014 levels until 2020.** Assuming 4,910 graduates from education/training institutions, plus allowance for new apprenticeship proposals to deliver 134 trained apprentices per annum between 2017 and 2020, i.e. a total of 536 chef apprenticeships over this period. These apprenticeships will cover commis chefs, sous chefs, chefs de partie and executive chefs.

Note: Totals may not exactly equal the sum of components due to rounding differences in the underlying data. n.e.c. signifies not elsewhere classified.

Source: Indecon Analysis

Table 5.6 presents a similar analysis of the likely impact of new entrants from education under Scenario 2.

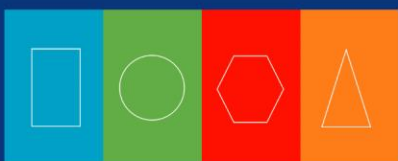


Table 5.6: Accounting for Supply of Skills between 2015 and 2020 - Scenario 2

Broad Categories	Occupations	Projected Total Skills Demand - (A)	Estimated New Entrants from Education/ Training - (B)*	Projected Skill Demand Shortfall accounting for entrants from Education/Training - Total (C=A-B)
Accommodation Managers	Functional managers and directors n.e.c.	6,224	3,120	3,104
	Hotel and accommodation managers and proprietors			
	Other Managerial roles in Sector			
Food Managers	Restaurant & catering managers and proprietors	14,378	875	13,503
	Publicans and managers of licensed premises			
	Catering and bar managers			
	Other Admin Staff in the Sector			
Skilled Food Preparation	Chefs	12,032	5,446**	6,586
	Cooks			
	Other Skilled Trades in the Sector			

* Assuming quantum of education and training output in relevant disciplines remains constant at 2014 levels until 2020.

** Assuming 4,910 graduates from education/training institutions, plus allowance for new apprenticeship proposals to deliver 134 trained apprentices per annum between 2017 and 2020, i.e. a total of 536 chef apprenticeships over this period. These apprenticeships cover commis chefs, sous chefs, chefs de partie and executive chefs.

Note: Totals may not exactly equal the sum of components due to rounding differences in the underlying data. n.e.c. signifies not elsewhere classified.

Source: Indecon Analysis

5.4.2 Illustrative Scenarios

Skilled food preparation, including chefs

Table 5.7 outlines an illustrative Scenario of the potential impact of different sources of new skills supply to address identified future skill demand among skilled food preparation occupations, including chefs, over the six-year period from 2015 to 2020.

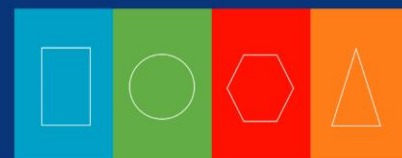


Table 5.7: Illustrative Scenario - Potential Sources of New Skills Supply to Address Projected Skill Demand - Skilled Food Preparation Occupations (including Chefs)

Potential Sources of New Supply to Address Projected Skill Demand 2015-2020 - Skilled Food Preparation Occupations (including Chefs)						
Projected Skills Demand 2015-2020 - Totals for two Scenarios	Potential Education/ Training Output*	Re-Training of Unemployed**	Reduction in Replacement Rate		Balance of Skills Demand Shortfall	
			% of Existing Replacement Rate			
All Skilled Food Preparation, incl. Chefs, Cooks and other skilled kitchen trades:			85%	70%	85%	70%
Scenario 1						
14,637	5,446	Approx. 1,900 to 2,500	1,591	3,181	5,700	4,110
Scenario 2						
12,032	5,446	Approx. 1,900 to 2,500	1,524	3,049	3,162	1,637

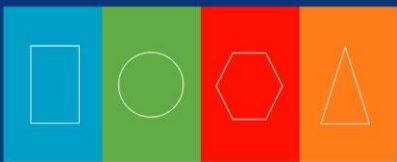
* This assumes that the quantum of education and training output in relevant disciplines remains constant at 2014 levels until 2020. It also assumes that new apprenticeship proposals deliver 134 trained chef apprentices per annum from 2017 to 2020, or a total of 536 over this period. These apprenticeships will cover commis chefs, sous chefs, chefs de partie and executive chefs.

** Based on Live Register statistics May 2015 (data provided by DSP), indicating number of persons who indicated they were fully trained in their former occupation (lower bound of range indicated) or who were fully trained or had some knowledge/expertise in the area (upper bound of range).

Source: Indecon Analysis

The analysis considers the impact of annual education and training output, the re-training/re-employment of relevant categories of unemployed persons on the Live Register, and alternative assumptions with regard to the impact of a reduction in the extent of staff replacement requirement. In relation to education and training output, the analysis factors in an assumption regarding additional incoming skilled labour in the form of new apprentices. The report of the Apprenticeship Council¹⁸ set out the proposals of individual organisations in relation to apprenticeships for chefs, covering commis chefs, sous chefs, chefs de partie and executive chefs. On the basis of the Council's June 2015 report, it is prudently assumed that if the five new chef apprenticeship programmes are developed as planned and commence in 2016, that the proposals could deliver 134 trained apprentices per annum from 2017 or an estimated 536 apprentices in total over the four-year period 2017-2020 (this would, however, be dependent on meeting the criteria outlined in the June 2015 Apprenticeship Council report, while such numbers would also need to be agreed with the Council). It is considered that there is scope to further increase apprenticeship numbers in the future, over and above the assumed levels.

¹⁸ Report of the Apprenticeship Council, June 2015. See Department of Education: <https://www.education.ie/en/Publications/Policy-Reports/Apprenticeship-Council-Report-on-New-Apprenticeship-Programme-Proposals.pdf>.



Finally, the above scenario also assumes that there are between 1,900 and 2,500 people on the Live Register, as of May 2015, who can potentially be retrained over the period 2015-2020 to further meet the skill demand for chefs and cooks. This assumption is based on data from the Department of Social Protection which provides information on the existing skill levels of those on the Live Register. For the purpose of estimating the new skills shortfalls, accounting for retraining of the unemployed, the conservative assumption of using the lower bound value of 1,900 in the analysis.

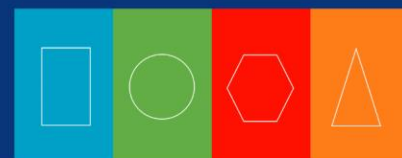
A lower forecast skills demand shortfall for these occupations results from accounting for potential new entrants from education, retraining individuals who are currently unemployed, and reducing the staff exit/replacement rate for skilled food preparation occupations. The baseline model under Scenario 1 forecasts a projected skills demand between 2015 and 2020 of 14,637. Accounting for new entrants from education and retraining of the unemployed, as well as assuming that the replacement rate is reduced to 85% of the base level results in a skills demand shortfall of 5,700. Assuming that the replacement rate falls to 70% of the baseline rate would further reduce this skills demand shortfall to 4,110 under Scenario 1. A similar scale of potential reduction in the skills gap can be observed for Scenario 2.

Kitchen/Catering Assistants

A similar illustrative scenario is presented in Table 5.8 in respect of kitchen/catering assistants. In this case, data constraints prevent an assumption being included with regard to annual inflows from education and training, and to the extent that new entrants come through the education and training sector, other factors being equal this would lower the estimated skill demand shortfalls of kitchen and catering assistants. Such education and training supply would include output from the further education sector, including hospitality-related minor and special purpose provision and relevant Momentum programme provision (see Tables 4.8 and 4.9).

A separate, ongoing source of labour supply for this occupation concerns the annual inflow of students who are engaged in full-time study. These students are not counted as part of the published replacement rates. Irish data was not available on the extent of the student workforce among kitchen and catering assistants. However, reference to UK research in this area indicated that approximately 18% of all kitchen and catering assistants are also full-time students.¹⁹ For the purposes of the analysis, it is assumed that the 18% figure from the UK also prevails in Ireland. The presence of such a substantial number of students in the workforce means that the high replacement rate indicated by the National Skills Bulletin may be overstating, as it fails to account for the entrance of a new cohort of students each year to replace those who may leave the occupation once their studies are concluded. It is assumed that, on average, half of the level of 18% (i.e., 9.5%) will leave the occupation each year as they conclude their studies, but that they will be replaced by incoming students the following year. This assumption will thus lower the overall replacement rate for the occupation by 9.5% per annum. In the analysis, this lowers the replacement rate for waiters and waitresses from 15.4% to 5.9%. The impact of this adjustment on the forecast skills demand shortfall can be seen in Table 5.8.

¹⁹ http://www.people1st.co.uk/People1st/media/People1st/Documents/People_1st_Policy_Insight_2.pdf



The analysis also includes potential new entrants to the occupation from retraining of the unemployed and the potential impact of lowering replacement rates. The potential reductions in the replacement rates are also replicated for the remaining, non-student staff, used in the above analysis in examining the impact of scenarios involving replacement rates at 85% and 70% of those used in the baseline analysis.²⁰

Table 5.8: Illustrative Scenario - Potential Sources of New Skills Supply to Address identified Skill Demand - Kitchen and Catering Assistants

Potential Sources of New Supply to Address Identified Skill Demand 2015-2020 - Kitchen and Catering Assistants						
Projected Skills Demand 2015-2020 Totals for two Scenarios	Est. Inflow of Students 2015-2020*	Re-Training of Unemployed**	Reduction in Replacement Rate***		Balance of Skills Demand Shortfall	
			85%	70%	85%	70%
			% of Existing Replacement Rate			
			85%	70%	85%	70%
Kitchen & Catering Assistants:						
Scenario 1						
27,126	14,500	Approx. 1,300 to 2,100	1,346	2,691	9,974	8,628
Scenario 2						
24,141	13,900	Approx. 1,300 to 2,100	1,287	2,573	7,683	6,396

*Total inflow of students over 6 year period, 2015-2020

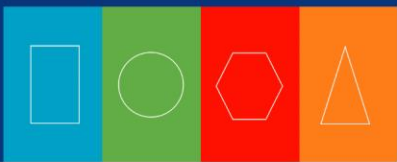
** Based on Live Register statistics as at May 2015 (data provided by DSP), indicating number of persons who indicated they were fully trained in their former occupation (lower bound of range indicated) or who were fully trained or had some knowledge/expertise in the area (upper bound of range).

*** For staff who are not full-time students. Accounting for the impact of students on the replacement rate indicates a replacement rate for those staff who are not students of 5.9%.”

Source: Indecon Analysis

Accounting for potential new entrants from retraining of existing unemployed people and reductions in the prevailing replacement rate makes a significant reduction in the skills shortfall for kitchen and catering assistants forecast in the baseline analysis. For Scenario 1, the forecast skills demand gap is reduced from 27,126 to 8,628. There is reduction of a similar magnitude under Scenario 2.

²⁰ It should be noted that this approach may overestimate the skills demand shortfall for kitchen and catering assistants; there is a quantum of minor and special purpose awards as well as Momentum programmes which would be relevant for kitchen and catering assistants, however, it is difficult to measure the exact educational supply arising from this as it is possible for individuals to achieve more than one minor or special purpose award in any given year.



5.4.4 Waiter/waitressing staff

A similar analysis to the above was undertaken for waiter/waitressing staff. In this analysis, as in the case of kitchen and catering assistants above, data constraints have meant that it has not been possible to include an assumption with regard to annual inflows from education and training, which could include a quantum of minor and special purpose awards, as well as Momentum programme provision, which would be relevant for waiters and waitresses, and could further reduce identified shortfalls, other factors remaining equal.

An estimate of the potential new entrants from the pool of currently unemployed people is provided using the same data source as mentioned above. Using data from the UK which suggests that 41%²¹ of all waiters and waitresses are also full-time students, Indecon adjusts the replacement rate used in the analysis to reflect the fact that with such a large proportion of the staff are students. The fact that nearly half of staff in the occupation are students suggests that the high replacement rate may be overstated, as it fails to account for the entrance of a new cohort of students each year to replace those who may leave the occupation once their studies are concluded.

For the purposes of our analysis, it is assumed that the 41% figure for students observed in UK also prevails in Ireland. It is then assumed that, on average, half of this 41% (i.e., 20.5%) will leave the occupations each year as they conclude their studies but that they will be replaced by incoming students the following year. This assumption will thus lower the overall replacement rate for the occupation by 20.5% per annum. In the analysis, this lowers the replacement rate for waiters and waitresses from 23.4% to 2.9%. The impact of this adjustment on the forecast skills demand shortfall can be seen in Table 5.9.

Adjusting the replacement rate to account for the flow of students in and out of the occupation and the number of potential new entrants from the live register makes a significant impact on the forecast skills demand shortfall over the period 2015-2020. The skills demand shortfalls forecast for both scenarios reduces by more than 80% compared to the baseline analysis if it is assumed that the replacement rate falls to 70% of the rate prevailing in the baseline analysis.

²¹ http://www.people1st.co.uk/People1st/media/People1st/Documents/People_1st_Policy_Insight_2.pdf

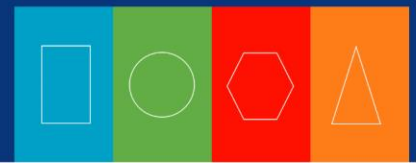


Table 5.9: Illustrative Scenario - Potential Sources of New Skills Supply to Address identified Skill Demand - Waiters and Waitresses

Potential Sources of New Supply to address identified Skill Demand 2015-2020 - Waiters and Waitresses						
<i>Projected Skills Demand 2015-2020 for the two Scenarios</i>	<i>Est. Inflow of Students* 2015-2020.</i>	<i>Re-Training of Unemployed**</i>	<i>Reduction in Replacement Rate***</i>		<i>Balance of Skills Demand Shortfall</i>	
			% of Existing Replacement Rate			
			85%	70%	85%	70%
Waiters and Waitresses:						
Scenario 1						
47,348	37,240	Approx. 1,300 to 1,900	493	987	8,314	7,820
Scenario 2						
42,681	35,440	Approx. 1,300 to 1,900	456	912	5,492	5,036

*Total inflow of students over six year period 2015-2020

** Based on Live Register statistics May 2015 (data provided by DSP), indicating number of persons who indicated they were fully trained in their former occupation (lower bound of range indicated) or who were fully trained or had some knowledge/expertise in the area (upper bound of range).

*** For staff who are not also students. Accounting for the impact of students on the replacement rate indicates a replacement rate for those staff who are not students of 3%.”

Source: Indecon Analysis

A similar analysis for bar staff is carried out in Table 5.10. Data from the UK from the same source as was used in the case of waiters and waitresses is used to estimate the prevalence of students amongst the bar staff labour force in Ireland. The UK data suggests that 25% of bar staff in the UK are also full time students. It is again assumed that half of these students will leave the occupation each year and be replaced by incoming students.

This assumption reduces the replacement rate for those remaining, non-student bar staff from 23.8% to 11.3%. The implications of these assumptions on the forecast skills demand shortfalls between 2015 and 2020 for bar staff in Ireland can be seen in Table 5.10.

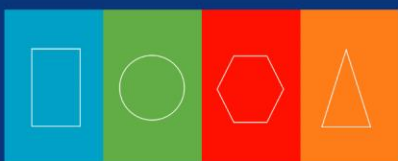


Table 5.10: Illustrative Scenario - Potential Sources of New Skills Supply to address identified Skill Demand - Bar Staff

Potential Sources of New Supply to Address Skill Demand 2015-2020 – Bar Staff						
Projected Skills Demand 2015-2020 Total for the two Scenarios	Average Annual Inflow of Students 2015-2020*	Re-Training of Unemployed**	Reduction in Replacement Rate***		Balance of Skills Demand Shortfall	
			% of Existing Replacement Rate			
			85%	70%	85%	70%
Bar Staff:						
Scenario 1						
31,322	15,115	Approx. 2,300 to 3,370	1,577	3,155	12,330	10,752
Scenario 2						
28,887	14,540	Approx. 2,300 to 3,370	1,500	3,000	10,545	9,045

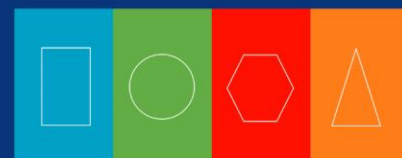
*Total inflow of students over six year period 2015-2020.

** Based on Live Register statistics May 2015 (data provided by DSP), indicating number of persons who indicated they were fully trained in their former occupation (lower bound of range indicated) or who were fully trained or had some knowledge/expertise in the area (upper bound of range).

***For staff who are not also students. Accounting for the impact of students on the replacement rate indicates a replacement rate for those staff who are not students of 11.3%.

Source: Indecon Analysis

Accounting for the impact of students on the replacement rate as well as the potential for those on the live register as a source of skilled labour significantly lowers the forecast skills demand shortfall for bar staff. The illustrative scenario above lowers the projected skill demand shortfall for bar staff by up to two thirds under both scenarios.



5.5 Summary of Key Findings

This assessment examined two alternative scenarios for the evolution of hospitality skills demand over the period 2015-2020. For each scenario, the analysis identified a breakdown of anticipated skill requirements by occupational category that result from expansionary demand (due to economic growth) on the one hand, and replacement demand required to meet ongoing exit of staff from existing employment in the sector on the other.

The analysis was then combined with assumptions with regard to prospective future education and training output, to assess the possible implications for skills supply of new entrants to hospitality occupations coming through the education and training sector, and to identify the likely skills demand shortfalls. The analysis also considered a set of illustrative scenarios, at the level of specific occupational categories, with regard to potential sources of new skills supply that could address identified skills demand shortfalls.

Table 5.11 summarises the scenarios examined and the associated projections for employment in Hospitality sector occupations to 2020.

Table 5.11: Total Employment in the Hospitality Sector across Scenarios

	Total Employment in Hospitality-related Occupations - 2014	Total Employment in Hospitality-related Occupations by 2020	% Growth viz. 2014
Scenario 1: Based on growth implied by Tourism Policy Review targets	157,990	179,534	13.6%
Scenario 2: Based on ESRI Mid-Term Review 'Economic Recovery' scenario	157,990	167,977	6.3%

Source: Indecon analysis

Scenario 1 assumes that the targets for employment in the Tourism sector stated in the Government's tourism policy review document are met and that employment in the Hospitality sector, inextricably linked with the Tourism Sector, grows in line with these targets. Employment growth projections in Scenario 2 are informed by Indecon's analysis of the Recovery Scenario in the ESRI's Medium-Term Review (MTR). The occupational forecasts under both scenarios are informed by the Indecon survey of employers in the Hospitality sector.

The main findings of the scenario analysis are as follows:

- Under Scenario 1, employment in the Hospitality sector is projected to reach 179,534 jobs by 2020, representing a 13.6% increase from 2014 levels. Skills demand shortfalls are projected in skilled food preparation occupations, administrative staff, and food service staff; and,
- Under Scenario 2, employment is projected to reach 167,977 jobs by 2020, implying an increase of 6.3% on the level in 2014. The highest demand growth is anticipated for chefs/cooks, waiters/waitresses and catering assistants, which is similar to Scenario 1 but at a lower level.

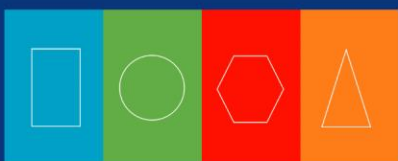


Table 5.12 summarises the occupational breakdown of projected overall skills demand over the six-year period from 2015 to 2020 implied under each scenario. Overall, there is anticipated to be a skills demand across hospitality occupations over this period amounting to between 96,006 and 110,723 persons when estimated annual inflows of students into waiters/waitresses, bar and kitchen/catering staff occupations are taken into account. In estimating how this supply may be met, it is then necessary to factor in the potential quantum of education and training output being carried forward and the addition of any new skills supply until 2020 as well as potential inflows from unemployment. The level of demand may also be reduced by industry improving on its replacement rates. It should be noted that approximately 90% of the total gross skill demand requirements are due to replacement demand.

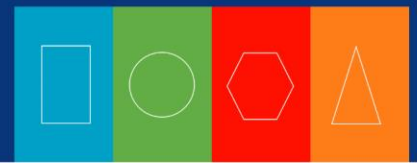
Table 5.12: Scenarios for Hospitality Skill Requirements to 2020 - Breakdown of Projected Skills Demand Requirements over period 2015-2020 (Expansion and Replacement Demand)

Scenarios for Hospitality Skill Requirements - Occupational Breakdown of Projected Skills Demand 2015-2020 (Expansion and Replacement Demand)		
Occupation	Projected Total Gross Skills Requirement- 2015-2020 Total	
	Scenario 1	Scenario 2
Functional managers and directors n.e.c.	2,391	2,190
Hotel and accommodation managers and proprietors	4,637	4,034
Restaurant and catering managers and proprietors	6,838	6,273
Publicans and managers of licensed premises	2,295	2,126
Receptionists	3,145	2,874
Other Admin Staff in the Hospitality and Food Sector	3,041	2,836
Chefs	12,869	10,594
Cooks	1,768	1,438
Catering and bar managers	6,418	5,979
Caring, Leisure, other services	3,472	3,092
Sales & Customer Service	5,758	5,294
Cleaners and domestics	3,358	3,008
Kitchen and catering assistants	12,619*	10,269*
Waiters and waitresses	10,107*	7,248*
Bar staff	16,207*	14,345*
Other elementary service occupations in the hospitality sector	4,666	4,239
Other AFS Employment	11,134	10,167
Total Employment	110,723*	96,006*

Note: n.e.c. signifies not elsewhere classified.

*Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Source: Indecon Analysis



6. Review of International Approaches

6.1 Introduction

This section presents a selection of international approaches to addressing skills requirements in the hospitality sector. A range of programmes and initiatives are considered within a number of comparable and non-comparable countries aimed at building the supply of talent and skills in the hospitality sector. A selection of countries have been included in the review including the UK, Switzerland and the Netherlands as well as some other more and less comparable countries on different continents where information was readily accessible.

6.2 Government Structures, Policies and Programmes

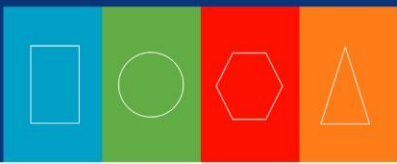
Governments recognise the importance of the Hospitality (and Tourism) sector but the nature of their involvements is quite varied in terms of the structures, policies and programmes that they put in place. The European Union is also involved in a significant way at a high level with particular attention paid since 2008 to dealing with the high levels of unemployment, particularly youth unemployment, across Europe.

Cedefop

Cedefop, the European Centre for the Development of Vocational Training is the European Union's reference centre for vocational education and training (VET). VET is considered to be a main pillar in Europe's endeavour to ease young people's transition into the labour market and out of unemployment. Cedefop supports the expansion and reform of apprenticeships as one way to deal with skills mismatch, considered to be one of Europe's key challenges. Apprenticeships and other forms of work-based learning are the main pillars of the EU's youth guarantee schemes.

Germany

Germany has long been considered by some to be the "model" for vocational training. The educational/training system in Germany is referred to as a "dual training" system with heavy vocational emphasis and use of apprenticeships. It is the responsibility of the Federal Ministry of Education and Research. The Vocational Training Act (revised in 2005) is a strong and well-developed regulatory framework under which the system operates. Companies involved in the training programme are also subject to labour laws such as the German Civil Code and various labour protection acts. In Germany, students spend most of their time in training with companies; this is coupled, however, with part-time classroom education. The system is highly regulated by the Ministry including: recognition of the occupation, designation of the occupation, duration of training, profile of minimum requirements, overall training plan (i.e., syllabus and schedule), and examination requirements. Students spend 3-4 days per week on the job and 1-2 days per week in class. The curriculum entails both vocational subjects (two-thirds) and general subjects (one-third). The prerequisite to the dual training vocational system is a full compulsory (2nd level) education. The vocational education takes anywhere from two to three and a half years to complete, and the final qualification received is a Chamber of Commerce certificate in a state-recognised training occupation. The Chambers of Commerce administer the examinations. There are 349 training



occupations in the system with varying degrees of specialisation. These range from specialised occupations (e.g., custom tailor) to non-specialised but with broadly employable skills (e.g. mechanical technician) to occupations cutting across different branches (e.g., office clerk). Overall, the German apprenticeship system has high completion rates of 75-80%.²² It is also interesting to consider progression routes for trainees; in Germany, fully trained individuals may after a fixed period of three to five years and following additional tests administered by the Chamber of Commerce become a Master ('Meister') of their profession.

For the Hospitality sector, it is in this context that the German National Tourist Board helps to provide vocational training standards, internships, and jobs, while the EURES job portal allows matching of employees to sector-specific jobs. The vocational training model in schools provides training contracts for students with companies as part of their education.

The Netherlands

In the Netherlands, the Adult and Vocational Education Act of 1996 established a single system of adult and vocational education for occupations across the tourism sector.

At the heart of the Act are the national qualification structures for adult and vocational education. Each qualification structure is a system of full and partial qualifications, each with its own diploma or certificate. Private educational institutions can take part in the national qualifications structure for vocational education subject to the same conditions as government-funded institutions, although they are not entitled to funding.

One of the Act's aims is to ensure that every person is able to obtain a minimum basic qualification. Educational institutions are free under the terms of the Act to devise learning pathways tailored to the needs of educationally disadvantaged students. As well as a socio-economic function (matching supply to demand, aiming towards greater employability), the Act therefore also has a socio-cultural function (mainly integration of disadvantaged groups, and greater social participation).

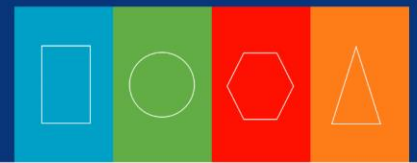
The 1996 Act also contains measures to bring education more into line with the world of work. The knowledge centres for vocational education and business that form the link between vocational education and the business sector organisations are called Centres of Expertise (KBB's). Organised by sector, they are managed by representatives of employers and employees, and in most cases, educational institutions. The centres are responsible for maintaining up-to-date occupational profiles on the basis of which they develop a clear qualification structure for VET setting out the knowledge and skills required by employers. Companies offering apprenticeship places are accredited by the KBB's, which monitor the quality and availability of these apprenticeships at a regional level. The centres are responsible for ensuring that hosts offering traineeships are assessed every four years and that the accredited companies are registered on a public website (Stagemarkt.nl) which allows learners to search for placements with approved employers.

This close alignment with labour market needs contributes to an outcome of 75% of vocational graduates being taken on by their training company and that some 51% of graduates consider that the training provided is a good basis with which to enter the labour market.²³

Approximately 250,000 vocational education placements were funded by the Netherlands in 2012.

²² http://ec.europa.eu/education/policy/vocational-policy/doc/alliance/apprentice-trainee-success-factors_en.pdf

²³ http://ec.europa.eu/growth/tools-databases/tourism-business-portal/documents/business/internationalisation/the_netherlands_country_report.pdf accessed on 29 May 2015



The United Kingdom

The UK government has been implementing a policy of significant reforms in further education (FE) with enterprise and employer ownership at the heart of the reform (the Employer Ownership Pilot), putting money for skills development in the hands of employers and local enterprise partnerships, ensuring that funding follows the learner, setting standards and monitoring performance, and encouraging colleges to become social enterprises. An overarching objective has been to ensure that vocational programmes are as challenging and respected as academic ones. The policy also addresses pre-employment programmes aimed at preparing young people for the world of work and at the unemployed, noting that these are not apprenticeships. These traineeships are intended to give the opportunity to spend substantial periods in the workplace, undertaking genuine workplace activities, in order to develop the general skills which the labour market demonstrably values.

The UK Skills Funding Agency is central to this reform effort. It funds skills training for further education (FE) in England through publicly funded colleges, training organisations, local authorities and employers (FE providers) that offer education and skills training, currently to the tune of GBP 4 billion annually including GBP 2.5 billion in the adult skills budget of which GBP 760 million was for adult apprenticeships in the 2014 financial year. Apprenticeships are at intermediate, advanced, higher, and degree levels (corresponding to Levels 2, 3, 4 and above 4, respectively). Over 850,000 people are in apprenticeships across all sectors in England in 2013-14.²⁴ The agency is funding *inter alia* Level 4 Higher Apprenticeships in Hospitality Management as well as a range of other apprenticeships for the leisure, travel and tourism sector. They also have six main European Social Fund (ESF) projects to support adults and young people, both employed and unemployed.

The UK Commission for Employment and Skills has initiated a programme called *Employer Ownership of Skills*, which is intended to engage employers in determining solutions to their skills needs. It is a fund which is open to UK employers. “Through the *Employer Ownership of Skills* pilot employers were invited to develop proposals that raise skills, create jobs, and drive enterprise and economic growth. Government has invested in projects in which employers are also prepared to commit their own funds in order to make better use of our combined resources.”²⁵

The UK Tourism Industry Council is: “a collaboration between government and the tourism industry focusing on jobs, skills and enterprise.”²⁶ It includes a subgroup for future skills needs which is charged with tasks to address skills, qualifications and apprenticeships. Specific tasks of the Council included setting up a training agency to elevate skills and employment in sector.

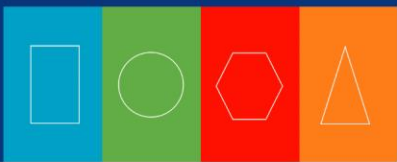
Additional programmes include part-funded projects such as Blackpool Council’s Blackpool Tourism Academy which aims to deliver 5,000 new training opportunities for staff up to 2017, including 100 apprenticeships.²⁷

²⁴ <https://www.gov.uk/topic/further-education-skills/apprenticeships>

²⁵ <https://www.gov.uk/government/publications/employer-ownership-of-skills-pilot> accessed on 29 May 2015

²⁶ <https://www.gov.uk/government/groups/tourism-council> accessed on 29 May 2015

²⁷ http://www.blackpool.ac.uk/news/15-04-15/landmark_day_for_blackpool_tourism_academy_apprentices



Switzerland

Tourism education in Switzerland was restructured under Swiss law.²⁸ This resulted in a greater variety of educational programmes and opportunities such as apprenticeships and training in tourism occupations other than hotel services.

Innotour is a government-funded initiative to promote innovation, cooperation, professionalisation (development and diffusion of knowledge and skills) amongst tourism SMEs.²⁹ There is a regional dimension to prevent an exodus of the best workers from the regions to the larger cities and to increase productivity. Examples of projects supported include:

- Training programme initiated by Private Selection Hotels to encourage enthusiasm and empathy in their staff; and,
- Web application which allows customer feedback for certain hotels, measures KPIs, etc. for staff.

USA

In the United States, local and regional government agencies are primarily responsible for implementing sectoral strategies by geographic area. However, the US Department of Labour is a federal agency which has invested in training initiatives in the hospitality sector.³⁰ Its division, the Employment and Training Administration, supports partnerships among employers, individuals and “other entities that have developed innovative approaches that address the workforce needs of business while also effectively helping workers find good jobs with good wages and promising career pathways in the hospitality industry.”³¹ It has recognised the Hospitality and Tourism Career Cluster and as such, identified Career Pathways, which concerns integration of foundational skills into training curricula.

In 2014, the US Workforce Innovation and Opportunity Act came into force. The intentions are that the needs of businesses and workers drive workforce solutions and local boards are accountable to communities in which they are located; that American Job Centers provide customer service to jobseekers and employers and focus on continuous improvement; and, that the workforce system supports strong regional economies and plays an active role in community and workforce development.

Canada

The Economic Action Plan 2013 introduced the Canada Job Grant. Under the programme, “nearly 130,000 Canadians each year are expected to have access to the training they need to fill available jobs. The Government will also renegotiate the Labour Market Development Agreements to reorient training toward labour market demand.”³²

The Sectoral Initiatives Program funds partnership-based projects that are national in scope and/or nationally significant and that support the development of labour market intelligence, national

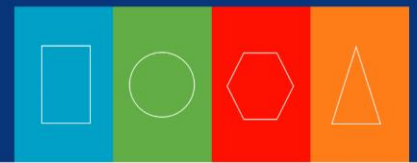
²⁸ Weiermair, K. and Bieger, T. (2005) “Tourism Education in Austria and Switzerland: Past Problems and Future Challenges”

²⁹ <http://www.seco.admin.ch/innotour/> accessed on 29 May 2015

³⁰ <http://www.doleta.gov/BRG/Indprof/Hospitality.cfm> accessed on 29 May 2015

³¹ Ibid.

³² <http://actionplan.gc.ca/en/initiative/canada-job-grant> accessed on 29 May 2015



occupational standards and competency frameworks and certification/accreditation regimes, to address skills shortages in strategic sectors of Canada's economy.³³

A range of Polytechnics offer two-year diplomas in culinary, tourism and hospitality, comparable to a Higher Certificate (Level 6) and which include a very strong vocational orientation including a work placement (for example, courses offered by the School of Hospitality and Tourism at SAIT Polytechnic).³⁴ Apprenticeships are also offered by these Polytechnics.

Philippines

The vision stated by the Philippines Department of Tourism in its National Tourism Strategy (2011-2016) is “to become the must-experience destination in Asia” and goals stated as “an environmentally and socially responsible tourism that delivers more widely distributed income and employment opportunities.”³⁵ Actions stated in the Plan include:

- Providing the policy framework for skills capability building at the national level and the resources and support mechanisms to implement this in the clusters at the regional level;
- Providing the policy framework and resources for improving labour relations and support mechanisms to implement this in the clusters at the regional level;
- Providing the policy framework and resources for professional tourism training and education at the national level, and support mechanisms to implement this in the clusters at the regional level; and,
- Providing the policy framework and resources for HR recognition, networking, and development.

Australia

In Australia, the national framework for skills development for several sectors including hospitality is the Department of Education and Training's SIT Tourism, Travel and Hospitality Industry Training Package.³⁶ It includes nationally recognised units of competency and qualifications to train and assess individuals in a range of skills and occupations in tourism, hospitality and events. This is currently being transitioned to Standards for Training Packages.

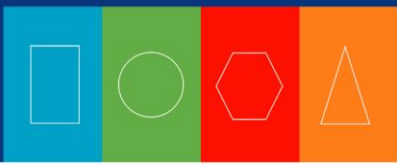
The responsible body is Service Skills Australia, an independent not-for-profit organisation funded by the Australian government, whose primary aim when developing nationally recognised training is to ensure that training is in step with the needs of employers and industry as a whole by consulting and engaging with as broad a range of stakeholders as possible. Their key stakeholder groups are: industry, both representative organisations and individual businesses; training professionals, including registered training organisations and trainers/assessors; industry regulators; and, a range of state/territory and federal government bodies.

³³ http://www.esdc.gc.ca/eng/jobs/lmi/sectoral_initiatives/index.shtml accessed on 29 May 2015

³⁴ <http://www.sait.ca/about-sait/schools/school-of-hospitality-and-tourism.php>

³⁵ NTDP Executive Summary accessed on 29 May 2015 on alt-tourism.aim.edu/files/download/179

³⁶ <https://www.serviceskills.com.au/tourism-hospitality-events-training-package> accessed on 29 May 2015



New Zealand

Noteworthy is the New Zealand government's general work permit policy for immigrants. It is points-based and comparatively generous and is designed to facilitate employment. This is due to the nature of the workforce and the economy. The New Zealand Immigration website indicates the following with regards to the hospitality sector:³⁷

- Long-term skills shortage list includes chefs (NZQF Levels 4 and 5 and with a minimum of five years' experience including a minimum of two years' experience as chef de partie). This indicates a sustained and ongoing shortage. It facilitates obtaining a work visa and allows application for a residence visa after two years, subject to certain conditions; and,
- Occupations such as cooks and café and restaurant managers are also included in a list of Skilled Occupations, which means that individuals are entitled to apply for a resident visa under the Skilled Migrant category.

6.3 Industry-based Approaches

There is a wide spectrum of different forms of hospitality and tourist industry involvement in job creation and skills development evident around the world ranging from industry bodies sitting in Government fora that coordinate the often disparate range of sectoral stakeholders to, on the other hand, private sector initiatives to independently develop skills and promote working in the sector. In countries with a history and culture of vocational education and apprenticeships, the integration of industry into sectoral education, training and skills decision-making tends to be tighter and more regularised. In Germany, for example, industry and the Chambers of Commerce play central roles. Typically, business establishments are members of private sector industry representative organisations that may represent one or more industries (hotels, restaurants, bars, etc.) in different fora although larger enterprises may be directly involved. In the European Union, there is also high level coordination between the national industry representative bodies by HOTREC.

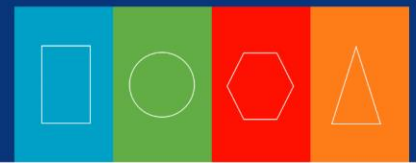
Industry can also be directly or indirectly involved in providing training although this is sometimes sub-contracted to private sector providers. People 1st with WorldHost in the UK and Hotelleriesuisse, the Swiss Hotel Association, are variants of this. (See below). As might be expected, training and education in the US is predominantly a private, not-for-profit university or specialised business school activity.

HOTREC

HOTREC is the umbrella association of national trade associations representing the hotels, restaurants, cafés and similar establishments in Europe. HOTREC therefore acts as the representative of the hospitality businesses vis-à-vis the EU institutions. It is constituted under Belgian law as a not-for-profit association. Its main objectives are:

- The promotion and defence of the interests of the hospitality industry towards the EU institutions; and,
- The enhancement of the cooperation between the national hospitality associations.

³⁷ <https://www.newzealandnow.govt.nz/work-in-nz/nz-jobs-industries/tourism-hospitality-jobs> accessed on 29 May 2015



HOTREC's principal activity is to monitor, analyse and keep its members abreast of any policy developments at EU level that have an impact on the Hospitality industry. It lobbies EU representatives on behalf of its member associations, provides the EU institutions with relevant input and participates in various discussion fora. One recent example concerned the rapid emergence of a shadow hospitality economy on peer-to-peer online platforms and resulted in the development of a work programme on its impact on employment.

UK

A number of bodies are active in skills development in hospitality and tourism in the UK.

The British Hospitality Association (BHA) is a private sector forum for hospitality-related businesses.³⁸ It is aimed at working with government for policies to enable sector growth and deliver jobs. Perhaps it's most significant contribution with regards to job growth is its campaign called "Big Hospitality Conversation" which is aimed at encouraging young people into the hospitality workforce. The goal is to create 300,000 new jobs by 2020 and 60,000 job opportunities for young people (aged 16-24).³⁹ An example of this overall initiative is the Apprentice Academy which will entail three hospitality companies taking on 200 apprentices to 2018 in food service and professional cookery.⁴⁰

In 2010, the BHA proposed a comprehensive plan for key Hospitality sector stakeholders and the British government to recognise the sector for its economic contributions and to improve its position in the economy.⁴¹ As part of the overall proposition, key actions included BHA cooperation with Cabinet Ministers and establishing a cross-cabinet committee for hospitality and tourism policy.⁴²

People 1st is an employer-led training body which operates more broadly than the hospitality sector. It offers advisory services for recruitment and training services, talent management, and apprenticeship services.⁴³ One feature of the programme related to the Hospitality sector is its "Centres of Excellence" designation in Food and Beverage Service, Patisserie and Confectionary and Asian and Oriental cuisine. "The Centres of Excellence are recognised for the high standard of training delivery in this specialist area and their commitment to ensuring that learners gain the skills they need to enter the industry.

People 1st identified several opportunities for raising the skills base in the Hospitality sector including: (1) recruit more diverse workforce, (2) targeted training and skills use, and, (3) skills and technology for raising productivity.⁴⁴ With regards to (2) targeted training and skills use, the organisation further developed targeted actions including:

- Develop apprenticeship system that reflects employers' needs;

³⁸ <http://www.bha.org.uk> on 29 May 2015

³⁹ <http://www.bha.org.uk/bhconversation/> accessed on 29 May 2015

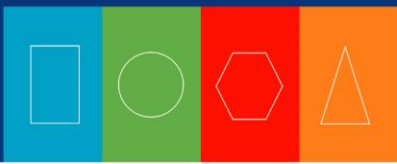
⁴⁰ http://www.bha.org.uk/bha_news/new-food-hospitality-apprentice-academy-launched-leading-businesses/ accessed on 29 May 2015

⁴¹ https://www.instituteofhospitality.org/news/November_Issue/bha_report_creating_jobs_for_britain accessed on 29 May 2015

⁴² Ibid.

⁴³ <http://www.people1st.co.uk/Apprenticeship-services/Apprenticeship-programmes> accessed on 29 May 2015

⁴⁴ People 1st Policy Insight 1: Raising Tourism Productivity through skills, accessed at www.people1st.co.uk on 10 June 2015.



- Create development pathways using professional standards rather than qualifications;
- Aligning career promotion with tangible development opportunities;
- Maximising and protecting quality of full-time college provision; and,
- Greater return on investment of training.⁴⁵

In its *State of the Nation Report 2013*,⁴⁶ People 1st reported that whereas apprenticeships are heavily backed by Government in the UK, only 5% of employers in the Hospitality and Tourism sector report that they employ people on an apprenticeship scheme. However 28% of employers reported that they were likely to employ an apprentice in the future.

WorldHost offers specific customer service training programmes through People 1st. Its programmes are “modern, interactive and energetic” and training sessions are comprised of “activities, scenarios and discussions”.⁴⁷ Successful participants receive recognised qualifications. WorldHost provides training services to a number of hospitality businesses including Marriott and Jurys Inn.

The Hospitality Guild is “an alliance of employers, skills bodies, individuals and training providers dedicated to simplifying and promoting the professionalism of the hospitality industry.”⁴⁸ It is a non-profit organisation which provides a portal for career development opportunities, i.e., training, apprenticeships, career support, etc. The guild provides a comprehensive and simplified approach by providing information to all members of the sector.

The Institute of Hospitality⁴⁹ is a professional body for individual managers and aspiring managers working and studying in hospitality, leisure and tourism internationally. It is a membership organisation promoting quality standards and education and supporting members' professional development throughout their careers, wherever they are in the world. The Institute is managed as an educational charity whose primary purpose is “to promote the highest professional standards of management and education in the international hospitality, leisure and tourism industries”. It covers all sectors of the industry including hotels, contract catering companies, restaurants, pubs and clubs, as well as leisure outlets, theme parks and sports venues. They offer a Diploma in Hospitality and Tourism Management (NQF Level 3) and an Advanced Diploma (NQF Level 4). They also offer qualifications in International Hospitality and Tourism at four levels. They have an online learning website including a number of free eLearning modules.

Germany

Due to the unique dual training system in Germany, hospitality industry businesses are well integrated within the training system and have direct input to skills development and employment (as described in Section 6.2: Germany, above).

Advantages of this system for the hospitality industry include:

- Secures the skilled labour needed;

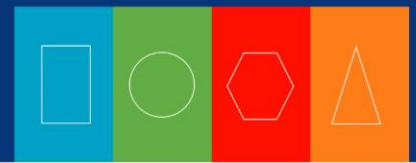
⁴⁵ People 1st Policy Insight 3: How do we recruit and retain a skilled tourism workforce? accessed at www.people1st.co.uk on 10 June 2015.

⁴⁶ http://www.people1st.co.uk/getattachment/Research-policy/Research-reports/State-of-the-Nation-Hospitality-Tourism/SOTN_2013_final.pdf.aspx

⁴⁷ WorldHost Customer Service Training Brochure 2015

⁴⁸ <http://www.hospitalityguild.co.uk/About-the-Guild> accessed on 29 May 2015

⁴⁹ <https://www.instituteofhospitality.org>



- Reduces cost of employees settling-in;
- Increases motivation and company loyalty;
- Creates job-specific qualification; and,
- Promotes the productivity of trainees.

Advantages of this system for young people include:

- Good prospects on the labour market;
- Recognised certificates;
- Practical orientation; and,
- Payment of an allowance while training.

Holland

SVH (Stichting Vakbekwaamheid Horeca) is the Dutch organisation responsible for education and professional development in the hospitality sector. Together with hospitality businesses, it provides training materials and examinations for career development and upskilling.⁵⁰ Traineeships and apprenticeships provide opportunities for students to develop their practical skills. These are conducted by nationally accredited training establishments.

The SVH Horeca (Hospitality) Roadshow is used in secondary (vocational) schools and encourages students to consider a career in the hospitality industry.⁵¹

Switzerland

Historically, Swiss tourism education and training was primarily available at hotel schools in Lausanne and Glion.⁵² There is a strong focus on education for export by these private sector schools. Rapid developments in the global tourism market, however, influenced “an uncoordinated development of different educational institutions which produced the need for a reorganisation of the tourism education and training sector. The new structure of tourism education introduced apprenticeships in tourism/hotel/gastronomy, travel agencies and public transportation and increased the transparency of the system.”⁵³

The Swiss Hotel Association (Hotelleriesuisse) provides vocational training at college “hotel schools” as well as practical training, entrepreneurial training, and marketing and sales. This is accomplished through training partners in 13 regional associations.⁵⁴ This is a part of the overall Swiss apprenticeship system; for example, Hotelleriesuisse indicates 1,039 apprenticeships available for chefs in 2015.

The Association also hosts Explorhôtel, a four-day course aimed at young people to encourage them to choose a career in hospitality, experiencing and working in hotel kitchens, reception, etc.

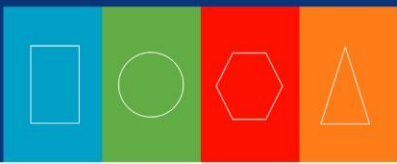
⁵⁰ <http://www.svh.nl/over-svh/inleiding.html> accessed on 29 May 2015

⁵¹ <http://www.svh.nl/kenniscentrum/svh-horeca-roadshow.html> accessed on 29 May 2015

⁵² http://ec.europa.eu/growth/tools-databases/tourism-business-portal/documents/business/internationalisation/switzerland_country_report.pdf accessed on 29 May 2015

⁵³ *Ibid.* at p. 4.

⁵⁴ <https://www.hotelleriesuisse.ch/en/pub/index.htm> accessed on 29 May 2015



United States

Hospitality training in the US can be done at university level, with hospitality management degrees available from a number of accredited institutions. Two examples of many are:

Cornell University School of Hotel Administration offers internationally accessible certified online hospitality courses as well as its regular courses available or in conjunction with onsite seminars. Its training philosophy is: “With over 200 companies and organizations currently engaged with the School, our goal is to build mutually beneficial relationships with the partners and friends of our centres and institutes, our industry event sponsors, our graduates’ employers, and the participants in our executive education programs. We value the experience, research, and support that these relationships bring to the School, truly helping to make us *the school for hospitality leadership*.”⁵⁵ It is presently rebranding itself as “The World’s Most Adventurous Business School”.

The Culinary Institute of America awards degrees in culinary arts, baking/pastry arts, culinary science, applied food studies and also provides executive education through its Food Business School and food enthusiast and wine appreciation programmes in the US and in Singapore.

Canada

The Canadian Tourism Human Resource Council is an organisation that brings together businesses, employees, SMEs and government agencies for the purpose of improving the quality of the Canadian labour force and helping businesses become more competitive. The council “is a leader in a number of areas, including ground-breaking work in the area of temporary foreign workers, foreign credential recognition, and its comprehensive suite of training and certification resources marketed under the EMERIT Tourism Training brand.”⁵⁶ The EMERIT hospitality training courses are eligible for grant funding to offset costs.

The Canadian Red Seal Programme is a nationwide certification programme with competency standards.⁵⁷ It currently includes 57 different trades, some of which are related to the hospitality sector.

The Canadian Tourism and Hospitality Institute specialises in training for careers in hospitality and awards management diplomas. The programme includes co-ops, career days, career development services and job placements.⁵⁸

Philippines

Many educational institutions offer hospitality related training in the Philippines. The Lyceum of Philippines University offers the first third-level accredited programmes for hospitality education in the country.⁵⁹ It also conducts the annual International Hospitality and Tourism Conference (began 2012), which includes participation by worldwide hospitality sector executives, government

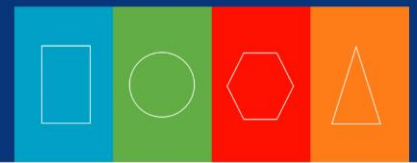
⁵⁵ <https://www.hotelschool.cornell.edu/industry/> accessed on 29 May 2015

⁵⁶ http://cthrc.ca/en/about_cthrc accessed on 29 May 2015

⁵⁷ <http://www.red-seal.ca/about/pr.4gr.1m@-eng.jsp> accessed on 29 May 2015

⁵⁸ <http://www.canadiantourismstitute.com/47/vision-mission-amp-objective> accessed on 29 May 2015

⁵⁹ <https://manila.lpu.edu.ph/index.php/about-cithm>



agencies and academia. There are seminars on recruiting, investment, training and market innovations.⁶⁰

The Hotel and Restaurant Association of the Philippines (HRAP) is an association of hospitality sector businesses for the purposes of programmes and projects to promote industry cooperation and unity, and to liaise with the government tourism agency.⁶¹ Through the Hotel and Tourism Institute of the Philippines (HTIP), HRAP offers training and management programmes using Singapore Hotel Association Training and Education Center modules and trainers.

Hong Kong

Wholly owned by Hong Kong Polytechnic University and an extension of its School of Hotel and Tourism Management, Hotel ICON in Kowloon is claimed to be the first teaching and research hotel of its kind in the world. It is a purpose-built hotel that integrates teaching, learning and research in a full-service environment. Located in a building complex that also houses the School campus, university staff quarters, research facilities, resource centres, classrooms, and faculty and administration offices, the hotel has 262 guest rooms and three restaurants

Australia

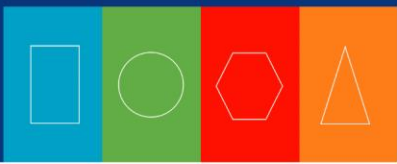
The National Tourism Alliance is the advocate for the Australian tourism and hospitality industry as a whole - pursuing high level engagement on national issues, common across the tourism and hospitality industry. As a true alliance, it brings together the weight of the industry on national policy debates and strategic planning for the industry, in the broader economic and community context. A key role of the NTA is to facilitate industry engagement with external stakeholders and provide the vehicle for those stakeholders to communicate with the industry. It also acts as the Secretariat for the Tourism and Hospitality Careers Council (THCC) which was established in 2013.

6.5 Summary of Key Findings

This section presented an overview of a range of structures, policies and programmes in other countries and in the EU designed to address skills requirements in the Hospitality sector at different levels. There was a broad distinction drawn between government-led and industry-led initiatives although the hallmark of many initiatives is the level of collaboration between government, industry and the education and training sector. A selection of countries were included in the review including the UK, Switzerland and the Netherlands as well as a number of other more and less comparable countries on different continents where information was readily accessible. It can be observed that the Irish hospitality sector is not unique in that it shares many characteristics with and issues faced by the sector in other countries and reported in the recent past. As such, this international review can provide some internationally-sourced ideas and solutions that could be adapted to fit with Ireland's particular circumstances as listed in the key findings that now follow:

⁶⁰ <http://www.philstar.com/travel-and-tourism/2012/10/14/859253/international-confab-hospitality-tourism-set-oct-24> accessed on 29 May 2015

⁶¹ <http://www.hrap.org.ph/aboutus.html> accessed on 29 May 2015



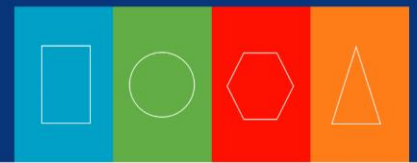
- There is a broad consensus about the importance of balance between a strong vocational education and training system (including apprenticeships and traineeships with significant practical work content) to complement more general hospitality management and academically-focussed courses.
- The Hospitality and Tourism industries, and their various representative bodies internationally, are involved in and often tightly integrated into the process of designing courses of education and training for the sector with education and training institutions. This is considered an effective way to ensure training remains responsive to labour market and business needs.
- Industry representative bodies are actively promoting the sector to attract new recruits and to counteract common negative perceptions of the sector and it not being a professional career choice.
- Accreditation, portability of skills and hospitality workforce mobility are treated as important.
- Particular attention is being paid to skills mismatches in Europe, seen as one element of the problem of unemployment, particularly youth unemployment.
- Comprehensive online hospitality portals are becoming more common.
- National occupational competency standards drive many education and training systems.
- Training can be contracted out to private sector providers and sometimes government restricts itself to policy, quality control and performance issues.
- Typically there is some form of national/regional oversight system to facilitate effective collaboration between all the many public and private sector stakeholders and educational and training institutions in what is a horizontally and vertically diverse and fragmented sector.

7. Conclusions and Recommendations

7.1 Key Findings and Conclusions

The key findings and conclusions from the assessment are as follows:

- The Hospitality sector plays an important role in the Irish economy, as evidenced by the fact that businesses in the sector together employ an estimated 158,000 persons. Overall, this represents over 8% of economy-wide employment.
- There is a need for a more structured approach nationally of responsibility to drive the Hospitality sector to meet skills demand to 2020. There is presently an absence of an overall leadership and coordination function for the skills development of the sector.
- Current skills shortages appear most evident at Trained Craft and Higher Craft levels. Among the main areas experiencing shortages is suitably qualified chefs, while shortages of commis chefs feed into shortages at higher and specialist levels, e.g., demi chef, chef de partie, and pastry chef. In addition, there are significant shortfalls emerging among front-of-house, waiting, catering, and bar staff, amongst others.

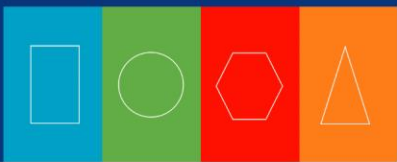


- Among the main reasons for existing skills shortages cited by businesses are insufficient numbers of people with appropriate training and experience, difficulty in filling posts, and difficulty in retaining staff once recruited.
- The scenarios for future skills demand out to 2020 project the highest demand growth to be among chefs/cooks, waiters/waitresses and catering assistants. .
- Addressing these projected skills demand will require a combination of approaches, including:
 - The need for a structured approach nationally to ensure oversight and coordination of stakeholders to meet the skills requirements of the sector;
 - Provision of additional education and training output including flexible CPD offerings, and entry of new skilled staff;
 - Re-training of unemployed former hospitality sector workers;
 - Increasing the attractiveness of employment opportunities and take-up of vacant positions;
 - Increasing staff retention and reducing the high extent of exit from certain occupations; and,
 - Increasing inward migration of skilled labour to address any skill gaps which cannot be met by other means, assisted where required by widening of employment permit criteria.

7.2 Recommendations

Based on the detailed assessment undertaken in this study, a set of policy recommendations has been identified. These are designed to address the identified skills requirements of the Hospitality sector over the period to 2020. The recommendations build on measures and programmes that are already underway, or which are currently under development, including apprenticeship schemes. The level of success ultimately achieved in addressing the future skills requirements identified in this study will, however, be dependent on industry, education/training and government stakeholders working on a collaborative basis to achieve the goals of ensuring a sufficient quantity and quality of skills.

The recommendations made in the subsequent tables are denoted by time-period for implementation: Short-term refers to 1-2 years and Medium-term' refers to 3 to 4 years.



1. Establish a National Oversight and Advisory Group for the Hospitality sector to oversee skills development and promotion in the sector.

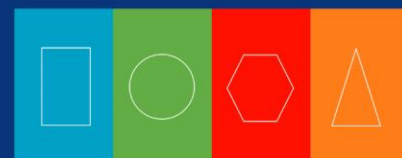
There is presently an absence of an overall leadership and coordination function for the skills development of the Hospitality sector. Given the number of stakeholders in the sector, there is a need for an appropriately constituted group to oversee the skills development and promotion of the sector and to forge a consensus between all of the parties involved. The successful development of the sector, including the provision of a sufficient quantity and quality of skills, will require a coordinated and collaborative approach by industry, education and training providers and other relevant stakeholders. This group would facilitate on-going communication and collaboration across the sector on an ongoing basis and will be fundamental to identifying and addressing skills needs in the longer term. The table below identifies the role that a new Oversight and Advisory Group for the Hospitality sector should play in both leading and collaborating on specific actions. An allocation of responsibilities is indicated in the form of the proposed composition and chairing of this group. It will be important that the Group coordinates with the new Department of Education and Skills-led regional skills fora, to ensure that local and regional Hospitality sector skills needs are fully recognised. The Oversight and Advisory group should be established as a high priority.

Supporting Measures

- The role of the National Oversight and Advisory Group would be to lead and collaborate on the:
 - implementation of recommendations made in this report;
 - effective management of the interface between the several bodies providing relevant hospitality related measures and supports;
 - provision of oversight of evidence on emerging hospitality skills needs;
 - monitoring of labour market developments in the Hospitality sector; and,
 - Co-ordination of regular reviews of hospitality education / training provision (ref. Recommendation 3 below).

Time frame: Short-term/ High Priority.

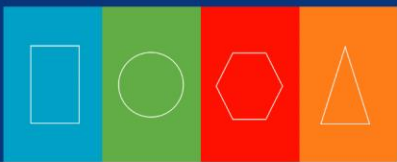
Lead: Group to comprise of SOLAS, Higher Education Authority (HEA), Quality and Qualifications Ireland (QQI), Fáilte Ireland, Education and Training Boards Ireland, Institutes of Technology Ireland, Irish Hotels Federation (IHF), Restaurants Association of Ireland (RAI), Irish Hospitality Institute (IHI), Licensed Vintners Association (LVA), and Vintners' Federation of Ireland (VFI). Group to be chaired initially by SOLAS, with chair rotating on an annual basis. Group should also coordinate with the Department of Education and Skills (DES) (incl. regional skills fora), the Department of Jobs, Enterprise and Innovation (DJEI) and the Department of Social Protection (DSP).



2. Introduce targeted measures and initiatives to address projected skills demand and ensure sufficient quantity and quality of skills for chefs and other specific hospitality occupations.

Specific targeted measures are needed to address specific occupations where substantial skills demand shortfalls are projected over the period 2015-2020. These include skilled Chefs; Kitchen and Catering Assistants; Waiters/Waitresses; and Bar staff. In relation to chefs, a substantial skill demand has been projected, amounting to between 10,500 and 12,900 positions over the period 2015-2020. In the table below several measures are identified to ensure that hotels, restaurants, bars and other food service establishments have access to the quantity and quality of chef skills required to meet future demand. The need for measures to address projected skills demand for other hospitality occupations, specifically front of house, catering, waiting and bar is outlined within recommendation 3.

Supporting Measures
<ul style="list-style-type: none"> Hospitality establishments to expand best practice measures (such as the IHF Quality Employer Programme) for improving the recruitment and retention of chef talent.
<p>Time frame: Short-term to Medium term. Lead: Irish Hotel Federation, Restaurants Association of Ireland.</p>
<ul style="list-style-type: none"> Undertake an audit of all culinary courses to ensure that all skill sets required by hospitality establishments are addressed. Fill demand for culinary teaching staff to ensure culinary facilities are fully utilised and more places made available. Ensure that available culinary capacity within IoTs can be shared by ETBs.
<p>Time frame: Short-term to Medium-term. Lead: HEA, IoTs, SOLAS, ETBs and Fáilte Ireland.</p>
<ul style="list-style-type: none"> Ensure the delivery of existing proposals and increase the future output of new industry-led chef apprenticeships, particularly for commis chefs, while ensuring that curriculum and assessment meet the standards that industry requires.
<p>Time frame: Short-term to Medium-term. Lead: IHF, RAI, IoTs, ETBs.</p>
<ul style="list-style-type: none"> Implement a job placement/upskilling programme for unemployed persons with previous chef experience, utilising ETBs, IoTs and industry teaching and training facilities/resources.
<p>Time frame: Short-term. Lead: Department of Social Protection/Intreo, IoTs, ETBs, working with hospitality enterprises.</p>
<ul style="list-style-type: none"> Promote opportunities for difficult-to-fill chef vacancies in Ireland through the European EURES Placement Network.
<p>Timeframe: Short-term to Medium-term. Lead: DSP/ EURES Placement Service.</p>
<ul style="list-style-type: none"> Where skills shortfalls for chefs persists it is possible for industry to make a submission that changes to the current employment permit criteria be considered under the new 6-monthly review process of permits for non-EU nationals.
<p>Time frame: Ongoing, 6 monthly. Lead: Hospitality Industry.</p>



3. Improve alignment of hospitality related education and training provision with the skills requirements of the Hospitality sector.

The successful future development of the sector will require an increased professionalisation and alignment of education and training provision with the skills demand of hospitality businesses. This will necessitate close collaboration between industry and education and training providers. It will require the development of comprehensive and innovative approaches including academic as well as apprenticeship and traineeship programmes; the introduction of appropriate national qualification standards; and enhancement promotion of education and training options for prospective students.

Supporting Measures

- Undertake periodic (3-yearly) reviews of the supply and utilisation of all hospitality and culinary courses, to identify any gaps in offerings. (commence within next 12 months) Reorganise teaching capacity, if necessary, to address any gaps in required provision and the requirement for up-to-date practical skills, and need for work experience components (this links to recommendation 7).
- Complete a national audit of culinary kitchen training facilities and identify scope to share facilities between higher education and FET including seasonal availability.
- Invest in development of ‘industry engagement offices’ in hospitality & culinary schools.
- Increase FET hospitality-related NFQ Level 4/5 programme provision for kitchen/catering assistants, bar staff and waiting staff. Provision to include customer service, cultural awareness, specialised reception and front-of-house skills, use of social media, IT tools and applications, numeracy, calorie counts, allergen requirements, and modern drink serving skills. Enhance progression pathways from NFQ Levels 4-5 to Levels 6+.
- Emphasise shorter, more accessible basic and specialist craft and practical courses (for example, based on attendance for ½ days at a time rather than full days). Utilise the Skills for Work programme to help employees with the basic skills demand of the workplace.
- FET hospitality related provision should be reported on separately as opposed to currently within a wider tourism career category. This would help to identify the level of such training being planned and delivered.
- Monitor the number and reasons for dropouts from hospitality courses and act to address.
- Produce and promote a comprehensive guide to Irish Hospitality, Culinary Education and Training Studies and potential career progression pathways via an online portal. This would build undertaken by Institutes of Technology Ireland in relation to IoT provision.

Timeframe: Short-term to Medium-term.

Lead: HEA, IOTs, SOLAS, ETBs and coordinated by National Oversight and Advisory Group.

- Expand Hospitality-related Apprenticeship and Traineeship schemes, and vocational skills training programmes to produce multi-skilled individuals with accredited qualifications.

Time frame: Short-term to Medium-term.

Lead: DES, Apprenticeship Council, SOLAS, Irish Hotel Federation, Restaurant Association of Ireland.

- Further professionalise the Hospitality sector through the introduction of National Occupational Standards developed jointly with industry and education & training bodies-to be applied by industry in recruitment, staff development and career progression.

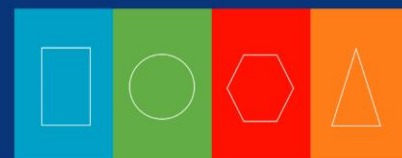
Time frame: Short-term to Medium-term.

Lead: QQI, SOLAS, HEA, ETBs, IoTs, in conjunction with industry representative bodies.

- Support appropriately dedicated Hospitality Skillnet with industry support.

Time frame: Short-term.

Lead: Skillnets, Irish Hotel Federation, Restaurants Association of Ireland, Irish Hospitality Institute.



4. Greater investment by hospitality establishments in management and staff training, appraisal and career progression.

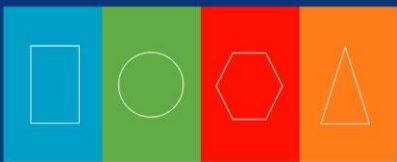
Investment in management and staff training, appraisal systems and career progression is a key response to ensure skill needs are met. There is a positive correlation between the application of good human resource management practice and businesses' ability to attract and retain motivated staff. Research for this study has found high rates of exit and turnover among staff in certain occupations (in particular among waiting staff and bar staff, and kitchen and catering assistants). Reducing these higher rates of exit and turnover could help reduce hiring costs for replacement staff and boost morale, loyalty and productivity among existing staff.

Supporting Measures
<ul style="list-style-type: none"> Act to improve talent retention and reduce high rates of exit in specific occupations.
<ul style="list-style-type: none"> Employ HR professionals (with SMEs applying outsourcing/cost-sharing mechanisms).
<ul style="list-style-type: none"> Prepare online Hospitality training toolkits (building on those developed by Fáilte Ireland, the IHF and the IHI) to guide businesses on aspects including staff rostering, human resource management, general management skills, revenue management, digital marketing, and 'train the trainer' to support on-the-job training.
<p>Time frame: Short-term to Medium-term.</p> <p>Lead: IHF, RAI, IHI, LVA and VFI and individual hospitality enterprises.</p>

5. Promote the Hospitality sector as a professional career choice.

The Hospitality sector suffers from a relatively poor image that does not reflect the diversity of opportunities that it provides. A national promotional campaign is needed to highlight the sector as an attractive and professional career choice. The integration of the new online Transition Year programme developed by the Irish Hospitality Institute in conjunction with Tralee Institute of Technology and supported by Fáilte Ireland will help promote hospitality careers to students, parents and schools and also industry facilitation for placements and entrepreneurial opportunities.

Supporting Measures
<ul style="list-style-type: none"> Formulate a cohesive plan to build on the existing IHI Transition Year Online Programme and other work to promote hospitality career opportunities to Transition year students and school-leavers and their parents, including through school visit programmes, work placements, traineeships and entrepreneurial opportunities.
<ul style="list-style-type: none"> Profile the sector positively to second level guidance counsellors.
<ul style="list-style-type: none"> The Leaving Cert Home Economics course could be reviewed in terms of content covered relevant to the Hospitality sector and rebranded to attract more male students. The potential for new short Junior Certificate hospitality related courses should be examined.
<ul style="list-style-type: none"> Engage with international institutions to provide Erasmus opportunities for hospitality students in key culinary centres and to interact with international educators and trainers.
<p>Timeframe: Short-term to Medium term.</p> <p>Lead: IHI, IHF, and RAI, in collaboration with LVA, VFI, Fáilte Ireland, DES.</p>



6. Tap into the Irish diaspora and embrace the ‘grey’ and other demographic segments of the workforce to close skills gaps and professionalise the sector.

As part of an overall plan to professionalise the Hospitality sector and to help meet projected skills demand, one approach that should be pursued is to tap into the Irish diaspora who have previous hospitality experience and who could potentially be attracted back to take up job opportunities here. There is also potential to promote take-up of employment among older age persons in the so-called ‘grey’ workforce, who could bring valuable life experience to roles within the sector.

Supporting Measures

- Initiate a national programme to attract Irish hospitality skills diaspora back to Ireland
- Facilitate recruitment from the ‘grey’ and other demographic segments of the workforce

Time frame: Short-term to Medium-term.

Lead: IHF / RAI / IHI with support from Department of Social Protection working through EURES Placement Network.

7. Introduce flexible accreditation options and life-long training logs to support portability of qualifications and mobility of Hospitality sector skills.

The introduction of recognised occupational standards is important for the development of the Hospitality sector. A combination of flexible accreditation with life-long training logs including skills ‘passports’ is a critical response to ensure adequate skills are developed. A co-ordinated approach is necessary to ensure flexibility in how courses are structured and scheduled to suit students, employers and teachers, and how accreditations are earned. There should be a further use of the extensive international Europass⁶² infrastructure that is already in place.

Supporting Measures

- Facilitate flexible completion options for major and minor awards and for CPD to accommodate industry work patterns and seasonality.
- Provide portable “passport” accreditation for all training including accredited on-the-job training based on the Europass system.

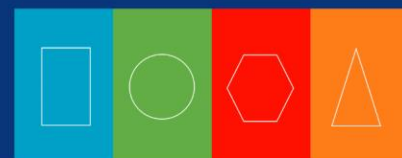
Time frame: Short-term to Medium-term.

Lead: HEA and QQI, supported by SOLAS, IOTs, ETBs, IHI, Skillnets, IHF, RAI and LVA/VFI.

8. Utilise employment schemes and tailored education and training programmes to assist unemployed hospitality workers return to work in the sector.

Significant numbers of people who previously worked in Hospitality sector occupations lost their jobs during the economic recession. The Live Register includes individuals who were previously trained and had particular expertise in occupations including the bar trade, chefs and catering assistants, waiters/waitresses and other hospitality occupations. Some of these may find employment in hospitality occupations as the economy recovers. However, others will require appropriate training/re-training, to maximise their likelihood of re-entering the workforce. Job schemes and training initiatives should factor in the unique personnel requirements of the

⁶² <https://europass.cedefop.europa.eu/en/home> and <http://www.europass.ie/europass/>



Hospitality sector, and also selection procedures that use occupational profiling to help identify appropriate and motivated individuals with e.g. natural flair for customer-facing positions.

Supporting Measures

- Ensure activation schemes including Springboard+and Momentum are designed to support the reintegration of unemployed hospitality workers back into employment.
- Support the return of unemployed former hospitality workers through employer engagement with INTREO including the JobPath employment activation programme, with a focus on Hospitality sector opportunities and requirements.

Time frame: Short-term.

Lead: Coordinated by DSP and DES, working with the HEA, SOLAS, Irish Hospitality Institute.

9. Enhance measures for the attraction of qualified chefs from the EU/EEA area while implementing actions to increase domestic supply and improve the attraction and retention of chefs.

Along with the focus on enhanced attraction and retention measures; the boosting of the domestic education and training supply and the retaining of unemployed and non-active labour force, there is a need to enhance measures for the continuing attraction of chef talent from EU/EEA countries through the European EURES placement network. The EURES job portal enables a matching of employees to sector-specific jobs. The new employment permit regime provides for a 6-monthly review of occupations eligible for permits for non-EU nationals. Currently chefs are ineligible except for a narrowly defined group i.e. executive chefs, head chefs, sous chefs, and specialist chefs specialising in cuisine originating from a State which is not a Member State of the EEA and working in establishments other than fast food outlets. There are additional eligibility criteria relating to general employment permits including a minimum remuneration threshold of €30,000. Where skills shortfalls for qualified chefs persist, notwithstanding measures aimed at increasing domestic supply and improving the attraction and retention of chefs, it is possible for industry to make a submission that changes to the existing employment permit eligibility criteria be considered under the new 6 monthly review process.

Supporting Measures

- Promote opportunities for difficult-to-fill chef vacancies through the European EURES Placement Network.

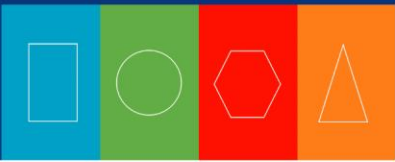
Time frame: Short-term to Medium-term.

Lead: Department of Social Protection, Irish Hotel Federation, Restaurants Association of Ireland.

- Where skills shortfalls for chefs persist it is possible for industry to make a submission that changes to the current employment permit criteria be considered under the new 6-monthly review process of permits for non-EU nationals.

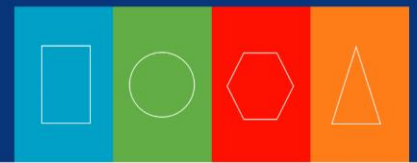
Time frame: Short-term to Medium-term.

Lead: Hospitality Industry.



7.3 Overall Conclusion

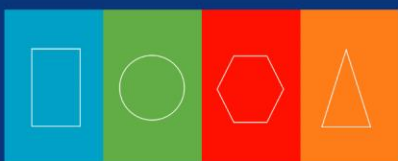
The Hospitality sector has significant potential for future growth. However, assuming a continued recovery in the economy, significant skills shortfalls are likely to emerge in key areas if actions are not taken in the short to medium term. The implementation of the recommendations set out in this report will facilitate the sector to make additional contributions to employment expansion in the Irish economy and to meet the targets set out in the Government's Tourism Policy Review.



Annex 1. Supply of Hospitality Education and Training Provision

Hospitality Education and Training Institutes in Ireland - Higher Education Institutes
Athlone Institute of Technology (AIT)
Cork Institute of Technology (CIT)
Dublin Institute of Technology (DIT)
Dundalk Institute of Technology (DKIT)
Galway-Mayo Institute of Technology (GMIT)
Institute of Technology Tallaght (ITT Dublin)
Institute of Technology, Tralee (IT Tralee)
Letterkenny Institute of Technology (LYIT)
Limerick Institute of Technology (LIT)
Waterford Institute of Technology (WIT)
Griffith College (private)
Shannon College of Hotel Management (merging into NUI Galway)

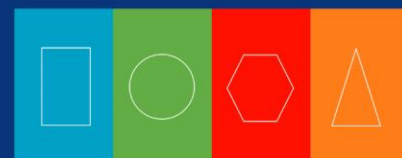
Source: Indecon analysis



Hospitality Education and Training Institutes in Ireland - Further Education Institutes/ETBs

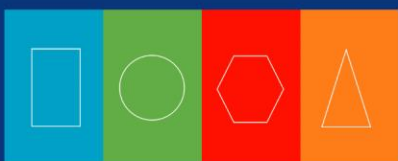
Ballyhoura Development Limerick / Clare ETB
Bray Institute of Further Education
BTEI Limerick City
Castlebar College of Further Education
Cavan Institute
Clare Local Development Company
Coláiste Chomain, Rossport, Ballina Co Mayo
Coláiste Ide College of Further Education
Coláiste Pobail Bheannta Bantry
Cork College of Commerce, Cork ETB
Crumlin College of Further Education
Drogheda Institute of Further Education
Dunboyne Institute of Further Education (Culinary modules take place in DIT)
Galway & Roscommon ETB
Griffith College
Kerry College of Further Education
Kinsale College and Cork ETB
Laois / Offaly ETB, BTEI Service, Tullamore
Limerick College of Further Education
Monaghan Institute of Further Education & Training
New Ross
New Ross VTOS
Shannon College of Hotel Management
Sligo College of Further Education
Tipperary ETB
Waterford & Wexford ETB
Waterford College of Further Education

Source: Indecon analysis



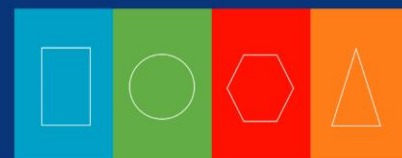
List of Higher Education Courses Offered by Institutes of Technology

Course Title	Provider	Region	NFQ Level	Duration	Enrolment 2014/15	Graduate numbers 2013/14
HC Arts Culinary Arts	AIT	Midlands	Level 6	2 years	61	31
HC Arts Bar Supervision	AIT	Midlands	Level 6	2 years	24	10
BA Hotel & Leisure Management	AIT	Midlands	Level 7	3 years	84	29
BA in Culinary Arts	AIT	Midlands	Level 7	1 year add-on	22	8
BBus (Hons) Tourism & Hospitality Management	AIT	Midlands	Level 8	1 year add-on	14	13
Diploma Restaurant Management	AIT	Midlands	Level 7	1 year PT	4 FT 1 PT	7 PT
BA Culinary Arts	AIT	Midlands	Level 7	3 years PT	4 FT 18 PT	6 FT 6 PT
Advanced Certificate Culinary Arts (Traineeship)	AIT	Midlands	FETAC 6	2 years PT	n/a	n/a
HC in Arts Culinary Arts	DKIT	Mid-East	Level 6	2 years	24	27
HC Arts Hospitality Studies	DKIT	Mid-East	Level 6	2 years	21	10
BA Culinary Arts	DKIT	Mid-East	Level 7	3 years	9	n/a
BA Hospitality Management	DKIT	Mid-East	Level 7	3 years	26	22
BA (Hons) Hospitality Management	DKIT	Mid-East	Level 8	1 year add-on	10	13
HC in Arts Culinary Arts	ITT Dublin	Dublin	Level 6	2 years	54	31
BA in Arts International Hospitality & Tourism Management	ITT Dublin	Dublin	Level 7	3 years	86	26
BA (Hons) International Hospitality & Tourism Management	ITT Dublin	Dublin	Level 8	4 years	76	26
BA Culinary Arts	ITT Dublin	Dublin	Level 7	1 year FT 2 years PT	6	6
BA International Hospitality & Tourism management	ITT Dublin	Dublin	Level 7	1 year add-on	-	-
BA (Hons) International Hospitality & Tourism Management	ITT Dublin	Dublin	Level 8	1 year add-on	-	-
BA in Culinary Arts	ITT Dublin	Dublin	Level 7	2 years PT	15	5
Advanced Certificate Professional Cookery	GMIT	West	FETAC 6	9 months PT	17	17
Advanced Certificate Professional Cookery	IT Tralee	South-West	FETAC 6	9 months	-	10
Advanced Certificate Professional Cookery	WIT	South-East	FETAC 6	1 year PT	16	15
Advanced Certificate Professional Cookery	CIT	South-West	FETAC 6	1 year	16	16



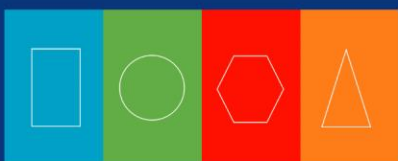
List of Higher Education Courses Offered by Institutes of Technology

Advanced Certificate Professional Cookery	LYIT	North-West	FETAC 6	1 year	13	13
Advanced Certificate Professional Cookery, National Traineeship	CIT	South-West	FETAC 6	2 years PT	16	17
Advanced Certificate Professional Cookery, National Traineeship	GMIT	West	FETAC 6	2 years Day Release	32	14
Advanced Certificate Professional Cookery, National Traineeship	LYIT	North-West	FETAC 6	2 years PT	24	7
Advanced Certificate Professional Cookery, National Traineeship	LIT	Mid-West	FETAC 6	2 years PT	14	-
Advanced Certificate Professional Cookery, National Traineeship	IT Tralee	South-West	FETAC 6	2 years PT	16	9
Advanced Certificate Professional Cookery, National Traineeship	WIT	South-East	FETAC 6	2 years PT	16	11
Certificate Culinary Skills	IT Tralee	South-West	Level 6	5 months PT	18	27
Certificate Culinary Arts	IT Tralee	South-West	Level 6	1 Year PT	18	-
HC Arts in Culinary Arts	LYIT	North-West	Level 6	2 years	59	33
HC Arts Culinary Arts	GMIT	West	Level 6	2 years	102	30
HC Arts Culinary Arts	LIT	Mid-West	Level 6	2 years	64	19
HC Arts Culinary Arts	IT Tralee	South-West	Level 6	2 years	60	25
HC Arts Culinary Arts	WIT	South-East	Level 6	2 years	63	31
HC Culinary Arts (Professional Culinary Practice)	DIT	Dublin	Level 6	2 years	93	39
HC Arts Culinary Studies	CIT	South-West	Level 6	2 years	87	68
HC Health & Nutrition for Culinary Arts	DIT	Dublin	Level 6	2 years	48	27
HC Arts Bar Supervision	GMIT	West	Level 6	2 years	23	6
HC Arts Bar & Restaurant Supervision	LYIT	North-West	Level 6	2 years	27	4
Certificate Front Office & Accommodation Operations	IT Tralee	South-West	Level 6	5 months PT	10	-
HC Arts Hotel Administration	LYIT	North-West	Level 6	2 years	12	2
HC in Business Hotel Front Office Management	LIT	Mid-West	Level 6	2 years	45	7
HC Arts Hospitality Studies	LIT	Mid-West	Level 6	2 years	23	8



List of Higher Education Courses Offered by Institutes of Technology

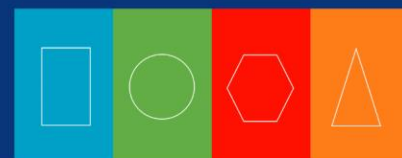
HC Arts Hospitality Studies	CIT	South-West	Level 6	2 years	30	20
HC Arts Hospitality Studies	GMIT	West	Level 6	2 years	23	10
HC Arts Hospitality Studies	IT Tralee	South-West	Level 6	2 years	25	5
HC Arts Hospitality Studies	WIT	South-East	Level 6	2 years	29	9
HC Hospitality Management (IHI)	DIT	Dublin	Level 6	2 years PT	38	14
BA Culinary Arts (flexible learning)	GMIT	West	Level 7	3 years PT	35	16
BA Culinary Arts	CIT	South-West	Level 7	3 years PT	25	25
BA Culinary Arts	LYIT	North-West	Level 7	3 years	59	15
BA Culinary Arts	LYIT	Mid-West	Level 7	1 year add-on PT	16	9
BA Culinary Arts	IT Tralee	South-West	Level 7	3 years	16	10
BBus Culinary Arts	CIT	South-West	Level 7	3 years	32	30
BBus Culinary Arts Management	GMIT	West	Level 7	3 years	82	35
BSc Baking & Pastry Arts Management	DIT	Dublin	Level 7	3 years	146	65
Diploma Restaurant Management	WIT	South-East	Level 7	1 year PT	15	5
Diploma Restaurant Operations Mgt	LYIT	North-West	Level 7	1 year	8	4
BBus Bar Management	CIT	South-West	Level 7	3 years	20	12
BBus Bar & Restaurant Management	GMIT	West	Level 7	3 years	45	14
BBus Hotel & Catering Management	GMIT	West	Level 7	3 years	110	35
BA Hotel, Restaurant & Resort Management	LYIT	North-West	Level 7	3 years	12	10
BA Hotel Management (TMDP)	IT Tralee	South-West	Level 7	3 years PT	48	11
BA Hotel Management	IT Tralee	South-West	Level 7	3 years	18	-
BA Hospitality Management	DIT	Dublin	Level 7	3 years PT	102	36
BA Hospitality Management	DIT	Dublin	Level 7	3 years	110	23
BBus (Hons) Hospitality Management	CIT	South-West	Level 8	1 year add-on	25	25
BA (Hons) Hospitality Management	WIT	South-East	Level 8	4 years	18	15
BSc Hospitality Management	DIT	Dublin	Level 8	1 year add-on	14	14



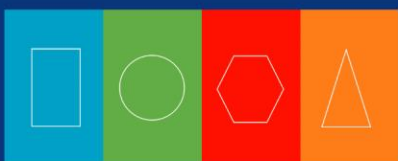
List of Higher Education Courses Offered by Institutes of Technology

BSc (Hons) International Hospitality Mgt	DIT	Dublin	Level 8	4 years	135	24
BA (Hons) Hotel Management	IT Tralee	South-West	Level 8	4 years	4	-
BA (Hons) Hotel & Catering Management	GMIT	West	Level 8	4 years	110	45
BA (Hons) Hotel & Catering Management	GMIT	West	Level 8	1 year add-on	30	-
BSc (Hons) Bar Studies - Mgt & Entrepreneurship	DIT	Dublin	Level 8	4 years	76	13
BBus (Hons) in Culinary Arts Management	GMIT	West	Level 8	1 year add-on	15	4
BSc (Hons) Culinary Arts with Food Technology	LYIT	North-West	Level 8	4 years	3	-
BA (Hons) Culinary Arts	LYIT	North-West	Level 8	1 year add-on	7	2
BA (Hons) Culinary Arts	WIT	South-East	Level 8	1 year add-on	13	5
BA (Hons) Culinary Arts	DIT	Dublin	Level 8	4 years	194	39
BSc (Hons) Culinary Entrepreneurship	DIT	Dublin	Level 8	4 years	116	28
MA in Culinary Arts	IT Tralee	South-West	Level 9	2 years PT	-	-
MSc in Culinary Innovation & Food Product Development	DIT	Dublin	Level 9	1 year FT 2 years PT	7	7
MSc in Hospitality Management	DIT	Dublin	Level 9	1 year FT 2 years PT	13	13
MA in Professional Hospitality & Tourism Management	IT Tralee	South-West	Level 9	2 years PT	-	7
BBS International Hotel Management	Shannon College of Hotel Mgt	Mid-West	Level 8	4 years	105	62
BComm International Hotel Management	Shannon College of Hotel Mgt	Mid-West	Level 8	4 years	12	26
MSc International Tourism and Hospitality Management	Griffith College	Dublin	Level 9	1 year FT 2 years PT	-	6
BA (HONS) Hospitality Management	Griffith College	Dublin	Level 8	3 years	-	-
Diploma International hospitality Management	Griffith College	Dublin	Level 7	1 year	-	-

Source: HEA data provided by DJEI



List of Further Education Courses offered by FET Institutes/ETBs					
Course Provider	Title	Region	NFQ Major Award level	Duration	Projected Starters 2015
Colaiste Ide College of Further Education	Hospitality Operations- comprises 3 days of week in college and 2 days on work placement	Dublin	Level 6	1 year	
Colaiste Ide College of Further Education	Professional Cookery	Dublin	Level 6	1 year	22
Colaiste Ide College of Further Education	Professional Cookery	Dublin	Level 5	1 year	20
Colaiste Ide College of Further Education	Professional Cookery - Delivered under Back to Work Programme	Dublin	Level 4	1 year Part-Time	20
Colaiste Ide College of Further Education	Professional Cookery (VTOS)	Dublin	Level 5	1 year	36
Crumlin College of Further Education	Chef-Day release Programme for Catering Industry. Trainees work FT as a chef in the kitchen of an approved establishment and attend College 1 day a week, and 1 week in Sept and May. Employers support trainees in paid employment.	Dublin	Level 6 graduates of Stage 1 may advance to the BA in Culinary Arts Level 7 in IOTS	2 years	
Crumlin College of Further Education	Culinary Arts - professional; Cookery	Dublin	Level 5		18
Bray Institute of Further Education	Professional Cookery	East	Level 5	1 year	
Drogheda Institute of Further Education	Culinary Arts	North - East	Level 5	1 year	
Dunboyne Institute of Further Education (Culinary modules take place in DIT)	Culinary Arts - Professional Cookery	East	Level 5	1 year	32
Cavan Institute	Hospitality Operations	Border	Level 5	1 year	12
Cavan Institute	Professional Cookery	Border	Level 5	1 year	36
Monaghan Institute of Further Education & Training	Accommodation & Hospitality Operations	Border	Level 5	1 year	
Sligo College of Further Education	Hotel & Catering	Border	Level 5	1 year	
Kerry College of Further Education	Hotel, Catering and Tourism	South-East	Level 5	1 year	20
Cork College of Commerce, Cork ETB	Professional Cookery	South West	Level 5	1 year	60
Cork College of Commerce, Cork ETB	Hospitality Operations	South West	Level 5	1 year	30
Kinsale College and Cork ETB	Professional Cookery	South-West	Level 5	1 year	20

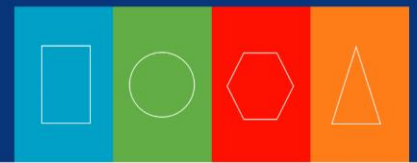


List of Further Education Courses offered by FET Institutes/ETBs					
Colaiste Pobail Bheantra Bantry	Culinary Skills (VTOS)	South-West	Level 4		20
Waterford College of Further Education	Hospitality Operations	South-East	Level 5	1 year	20
Waterford & Wexford ETB	Catering Introduction	South-East	Level 5	1 year	10
New Ross VTOS	Culinary Skills	South-East	Level 4	1 year	10
New Ross	Professional Cookery	South-East	Level 5	1 year	10
Tipperary ETB	Tourism with Hospitality Skills	South-East	Level 5		18
Limerick College of Further Education	Culinary Skills	Mid-West	Level 5	1 year	
Limerick College of Further Education	Reception/Office Administration	Mid-West	Level 5	1 year	
BTEI Limerick City	Kitchen Skills	Mid-West	Level 4	Part-time	12
Ballyhoura Development Limerick / Clare ETB	Catering Support	Mid-West	Level 4	8 months	16
Clare Local Development Company	Hospitality Operations	Mid-West	Level 5	10 months	18
Castlebar College of Further Education	Hospitality Operations	West	Level 5	1 year	
Colaiste Chomain, Rosspport, Ballina Co Mayo	Professional Cookery	West	Level 5	1 year	18
Galway & Roscommon ETB	Culinary Skills	West	Level 4	9 months	
Laois / Offaly ETB, BTEI Service, Tullamore	Restaurant Operations	Midlands	Level 5	1 year	15

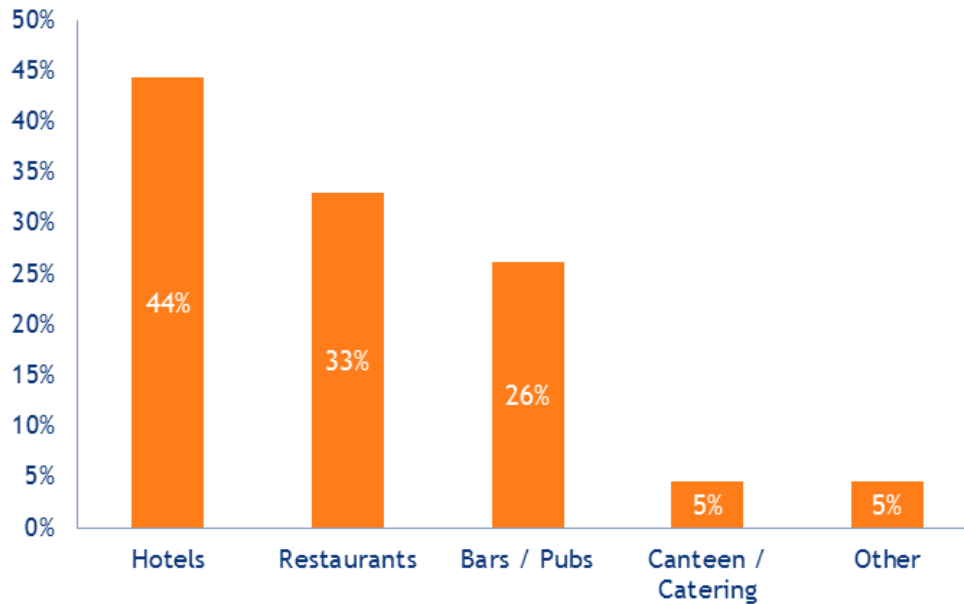
Source: DJEI/EGFSN

Springboard+ Hospitality related Provision				
Provider	Course Title	NFQ Level	ECTS credits	Places
Year 2013				
IT Tralee	Certificate Culinary Skills	Level 6	30	49
Year 2014				
IT Tralee	Certificate Culinary Skills	Level 6	30	15
Year 2015				
DIT	Higher Diploma Hospitality Management	Level 8	60	25
DKIT	Higher Certificate in Hotel and Restaurant Supervision	Level 6	60	20
DKIT	Certificate in Hospitality Operations (Sept 2015 intake)	Level 6	20	20
IT Tralee	Certificate Culinary Skills	Level 6	30	18
Year 2016				
DKIT	Certificate Hospitality Operations (Sept 2016 intake)	Level 6	20	20

Source: DJEI/EGFSN



Annex 2. Characteristics of Respondents to Hospitality Businesses Survey



Note: Some businesses indicate more than one business activity. The above percentages have been calculated on the basis of the total number of respondents. Therefore the total across business activities exceeds 100%.

Source: Indecon Confidential Survey of Hospitality-Related Organisations

Staff Numbers - Respondents to Survey of Hospitality Businesses					
	Hotel	Restaurant	Bar / Pub	Canteen / Catering	Other
Full-Time Staff Number	2178	317	258	51	11
% distribution of full-time staff across respondents	83%	12%	10%	2%	0%
Part-Time Staff Number	1484	281	267	85	6
% distribution of part-time staff across respondents	76%	14%	14%	4%	0%

Note: Some businesses indicate more than one business activity and it is not possible to distinguish between staff employed in different business activities within the same business. Percentages of total staff are calculated based on total FT (2,640) and PT (1,945) staff indicated across the survey. Therefore % distribution total may exceed 100%.

Source: Indecon Confidential Survey of Hospitality-Related Organisations

Approx. 58% of employment in surveyed respondent businesses were full-time and 42% part-time.

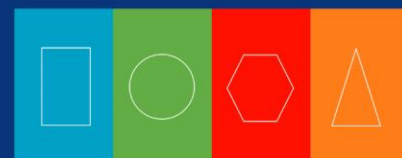
Annex 3. Scenarios of Projected Skills Demand 2015-2020

Projected Skills Demand by Occupational Level (2015-2020) - Scenario 1						
Occupational Level	2014 Employment	Projected Employment 2020	Requirement from Demand Growth	Anticipated Retirements	Gross Exits from Occupations to Inactivity	Projected Skills Demand
	A	B	C = (B-A)	D	E	F = (C+D+E)
Functional managers and directors n.e.c.	3,000	3,270	270	387	1,733	2,391
Hotel and accommodation managers and proprietors	8,242	9,146	904	1,401	2,331	4,637
Restaurant and catering managers and proprietors	6,299	6,990	691	472	5,675	6,838
Publicans and managers of licensed premises	3,436	3,673	237	636	1,422	2,295
Receptionists	3,087	3,428	341	93	2,712	3,145
Other Admin Staff in the Hospitality and Food Sector	3,111	3,368	257	93	2,691	3,041
Chefs	23,948	27,470	3,522	718	8,628	12,869
Cooks	3,200	3,711	511	96	1,161	1,768
Catering and bar managers	5,724	6,248	524	544	5,350	6,418
Caring, Leisure, other services, SOC 6	4,406	4,928	522	758	2,192	3,472
Sales & Customer Service SOC 7	5,504	6,077	573	-	5,185	5,758
Cleaners and domestics	3,810	4,294	484	381	2,493	3,358
Kitchen and catering assistants	23,255	26,903	3,649	1,163	22,314	27,126 (12,619)*
Waiters and waitresses	27,509	32,364	4,855	413	42,081	47,348 (10,107)*
Bar staff	18,719	21,222	2,504	655	28,164	31,322 (16,207)*
Other elementary service occupations in the hospitality sector	3,086	3,551	465	127	4,073	4,666
Other AFS Employment	11,655	12,891	1,236	899	8,999	11,134
Total	157,990	179,534	21,544	8,836	147,206	177,586 (110,723)*

*Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Note: Totals may not exactly equal the sum of components due to rounding differences in the underlying data. Data for 2014 sourced from SOLAS/SLMRU analysis of data from QNHS and Indecon sectoral/occupational allocations and analysis. n.e.c. signifies not elsewhere classified.

Source: Indecon Analysis

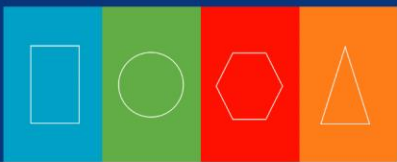


Projected Skills Demand by Occupational Level (2015-2020) - Scenario 2						
Occupational Level	2014 Employment	Projected Employment 2020	Requirements from Demand Growth	Anticipated Retirements	Gross Exits from Occupations to Inactivity	Projected Skills Demand
	A	B	C = (B-A)	D	E	F = (C+D+E)
Functional managers and directors n.e.c.	3,000	3,125	125	387	1,678	2,190
Hotel and accommodation managers and proprietors	8,242	8,661	419	1,401	2,213	4,034
Restaurant and catering managers and proprietors	6,299	6,619	320	472	5,480	6,273
Publicans and managers of licensed premises	3,436	3,546	110	636	1,380	2,126
Receptionists	3,087	3,245	158	93	2,623	2,874
Other Admin Staff in the Sector	3,111	3,230	119	93	2,624	2,836
Chefs	23,948	25,581	1,632	718	8,243	10,594
Cooks	3,200	3,437	237	96	1,105	1,438
Catering and bar managers	5,724	5,967	243	544	5,192	5,979
Caring, Leisure, other services, SOC 6	4,406	4,648	242	758	2,092	3,092
Sales & Customer Service SOC 7	5,504	5,769	266	-	5,028	5,294
Cleaners and domestics	3,810	4,034	224	381	2,403	3,008
Kitchen and catering assistants	23,255	24,946	1,691	1,163	21,287	24,141 (10,269)*
Waiters and waitresses	27,509	29,760	2,250	413	40,018	42,681 (7,248)*
Bar staff	18,719	19,879	1,160	655	27,072	28,887 (14,345)*
Other elementary service occupations in the sector	3,086	3,301	216	127	3,896	4,239
Other AFS Employment	11,655	12,228	573	899	8,695	10,167
Total	157,990	167,977	9,986	8,836	141,030	159,853 (96,006)*

*Adjusted to reflect estimated annual inflow of students in the Kitchen/Catering Assistants, Waiters/Waitresses and Bar Staff occupations.

Note: Totals may not exactly equal the sum of components due to rounding differences in the underlying data. Data for 2014 sourced from SOLAS/SLMRU analysis of data from QNHS and Indecon sectoral/occupational allocations and analysis. n.e.c. signifies not elsewhere classified.

Source: Indecon Analysis

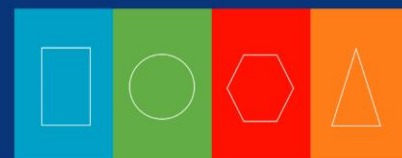


Annex 4. List of Occupations included in “Other Occupations”

List of Occupations included in "Other Occupations"
Financial managers and directors
Marketing and sales directors
Purchasing managers and directors
Advertising and public relations directors
Human resource managers and directors
Information technology and telecommunications directors
Functional managers and directors n.e.c.
Leisure and sports managers
Chartered and certified accountants
Sports players
Sports coaches, instructors and officials
Fitness instructors
Financial and accounting technicians
Business sales executives
Marketing associate professionals
Sales accounts and business development managers
Conference and exhibition managers and organisers
Book-keepers, payroll managers and wages clerks
Financial administrative occupations n.e.c.
Stock control clerks and assistants
Other administrative occupations n.e.c.
Office managers
Office supervisors
Gardeners and landscape gardeners
Groundsmen and greenkeepers
Bakers and flour confectioners
Cooks
Sports and leisure assistants
Travel agents
Air travel assistants
Rail travel assistants
Leisure and travel service occupations n.e.c.
Hairdressers , barbers , beauticians
Caretakers
Cleaning and housekeeping managers and supervisors
Sales supervisors
Customer service occupations
Customer Service managers and supervisors
Launderers, dry cleaners and pressers
Elementary security occupations n.e.c.
Elementary storage occupations
Other elementary service occupations n.e.c.

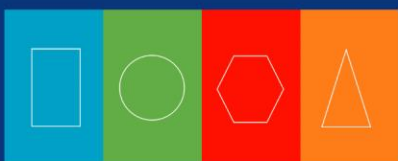
Note: n.e.c. signifies not elsewhere classified.

Source: Indecon sectoral / occupational allocations



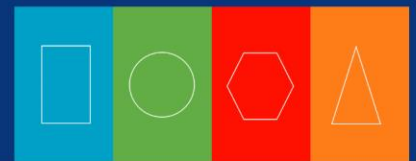
Annex 5: Steering Group Members

Name	Organisation
Frank Mulvihill, (Chairperson)	Former President of the Institute of Guidance Counsellors / Member of EGFSN
Natasha Kinsella	Irish Hospitality Institute
Stephen Mc Nally	Irish Hotel Federation
Tim Fenn	Irish Hotel Federation
Adrian Cummins	Restaurant Association of Ireland
Breda Miley	Noel Recruitment
Anne Trebett	The Fitzwilliam Hotel
Mary-Rose Stafford	Irish Academy of Hospitality & Tourism
John Mulcahy	Fáilte Ireland
John Mc Grath	SOLAS
Bryan Fields	SOLAS
Alan Mc Grath	Higher Education Authority
Alan Nuzum	Skillnets
Ralf Burbach,	Dublin Institute of Technology
John Kearney	Cavan/ Monaghan ETB
John Kelly	Department of Transport, Tourism and Sport
Gerard Walker (Project Manager)	Strategic Policy Division, Department of Jobs, Enterprise and Innovation
Marie Bourke	Strategic Policy Division, Department of Jobs, Enterprise and Innovation



Annex 6: Members of the Expert Group on Future Skills Needs

Name	Organisation
Una Halligan	Chairperson
William Parnell	Head of Secretariat and Principal Officer, Skills Policy Unit, Department of Jobs, Enterprise and Innovation
Inez Bailey	Director, National Adult Literacy Agency
Peter Baldwin	Assistant Secretary, Department of Education and Skills
Ray Bowe	IDA Ireland
Tom Boland	Higher Education Authority
John Burke	Department of Public Expenditure and Reform
Liz Carroll	Training and Development Manager, ISME
Ned Costello	Chief Executive, Irish Universities Association
Margaret Cox	Managing Director, I.C.E. Group
Bill Doherty	Executive Vice President, EMEA, Cook Medical
Tony Donohoe	Head of Education, Social and Innovation Policy, IBEC
Bryan Fields	Director, Strategy, Research and Evaluation, SOLAS
Joe Hogan	Founder, Chief Technology Officer & VP Openet Labs & IP Management
Declan Hughes	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Colm Mac Fhionnlaoich	Manager CMD and Client Skills, Enterprise Ireland
Deirdre McDonnell	Principal Officer, Department of Education and Skills
Frank Mulvihill	Former President of the Institute of Guidance Counsellors
Brendan Murphy	President, Cork Institute of Technology
Alan Nuzum	CEO, Skillnets
Peter Rigney	Industrial Officer, ICTU



Annex 7: Recent Publications by the Expert Group on Future Skills Needs

Report	Date of Publication
Regional Labour Markets Bulletin 2015	October 2015
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2015	August 2015
National Skills Bulletin 2015	July 2015
Vacancy Overview 2014	May 2015
Lifelong Learning among Adults in Ireland, Quarter 4 2014	May 2015
A Study of the Current and Future Skills Requirements of the Marine/Maritime Economy to 2020	April 2015
The Expert Group on Future Skills Needs Statement of Activity 2014	April 2015
Addressing the Demand for Skills in the Freight Transport, Distribution and Logistics Sector in Ireland 2015 - 2020	February 2015
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2015	January 2015
Regional Labour Markets Bulletin 2014	September 2014
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2014	August 2014
National Skills Bulletin 2014	July 2014
Vacancy Overview 2013	May 2014
Assessing the Demand for Big Data and Analytics Skills, 2013 - 2020	May 2014
The Expert Group on Future Skills Needs Statement of Activity 2013	March 2014
Regional Labour Markets Bulletin 2013	March 2014
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2014	February 2014
Addressing Future Demand for High-Level ICT Skills	November 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2013	July 2013
National Skills Bulletin 2013	July 2013
Future Skills Requirements of the Manufacturing Sector to 2020	April 2013
The Expert Group on Future Skills Needs Statement of Activity 2012	April 2013
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2013	February 2013
Vacancy Overview 2012	February 2013
Regional Labour Markets Bulletin 2012	January 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2012	July 2012
National Skills Bulletin 2012	July 2012
Key Skills for Enterprise to Trade Internationally	June 2012
EGFSN Statement of Activity 2011	April 2012
Vacancy Overview 2011	February 2012
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise	February 2012
Addressing High-Level ICT Skills Recruitment Needs: Research Findings	January 2012

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