

AUDIT OF HOSPITALITY COURSES IN FURTHER AND HIGHER EDUCATION

Report commissioned by SOLAS and the HEA on behalf of
the Hospitality Skills Oversight Group

November 2017

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1. Introduction

This report was commissioned by SOLAS and the HEA on behalf of the Hospitality Skills Oversight Group. It provides a high level of analysis of the data available that shows the numbers of courses, enrolments and awards in the Hospitality sector to enable the Group to determine how it might address the skill sets required by the sector and to aid it in identifying gaps in the provision of courses.

The report contains sample data analysis and suggested or recommended analysis. It is not definitive in its analysis as more information could be produced from the data available. It is also not complete in its analysis as there are variants in the time periods that the data is available for across the Further Education and Training (FET) sector and the Higher Education and Training (HET) sector.

The various data tables (*explained in further detail below*) that have been built from the collected data have been specifically constructed to allow for any additional or further analysis to be carried out as required by the Hospitality Skills Oversight Group.

In developing this report, the first task was to identify which courses and awards were relevant to this analysis, namely, courses and awards that could be clearly identified as being specifically targeted at providing graduates to the hospitality sector. To do this we needed to set clear parameters around what we regarded the Hospitality Sector to be along with a focus on specific occupations that could be recognised as being within those parameters.

Within the Terms of Reference as provided by SOLAS and the HEA, the source for these parameters was indicated as being derived from the 2015 study by the Expert Group on Future Skills Needs *Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020*.

1.1. Definition of the Hospitality Sector

For this report a definition for the Hospitality Sector has been taken directly from *Assessments of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020* Executive Summary November 2015. In that study, it is stated that *'The Hospitality sector in Ireland is comprised of hotels, restaurants, bars, pubs, canteens and catering operators'* (P6, E.2).

1.2. Definition of Hospitality Employment

To identify the specific courses and awards being provided by both the Higher Education and Further Education and Training sectors appropriate to this study reference can also be found in the *'Assessments of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020'* Executive Summary November 2015 (P5, E.1).

In that report, it states that *"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 key hospitality-related occupations"*.

1.3. Definition of Enrolments

Enrolments refer to the total number of actual students in the system in any given Academic Year.

From analysis of the data received from the HEA and through research on the HEA website this is the term used to refer to the number of students enrolled full-time or part-time on courses across each year of that course.

For example, in the 2015-2016 Academic Year there were 29 students enrolled full-time Year 1, 10 students enrolled full-time Year 2 and 1 student enrolled part time Year 2 on an Undergraduate Certificate in Arts in Bar Supervision in one particular Institute of Technology. The total number of students enrolled for that Academic Year on that course is 40.

The term enrolled is therefore being used across both data sets from HET and FET sectors to determine the total values. Any values relating to places or provision are not included.

1.4. Data Tables

All the data received or collected has been re-built into Excel data tables. This means that whilst the report has information based on a selected analysis, further and/or deeper information is quickly and easily available to anyone with access to the data tables.

The structure of the data now allows for reports to be built using Excel Pivot Tables and by extension Pivot Charts.

There are 6 data tables in total that have been built from data received either directly from the HEA, ETBI and QQI or built through research and harvesting of data from online sources such as the HEA, fetchcourses.ie and QQI websites as follows:

- HEA Courses and Enrolments 2011-2016
- HEA Awards 2011-2015
- FET Courses and Enrolments 2015-2016
- FET Awards 2013-2016
- Combined Courses and Enrolments for Academic Year 2015-2016
- Combined Awards data for 2013-2015

The data available to us from the HET and FET sectors does not match the same time periods.

1.4.1. Courses and Enrolments Data

Data is available for courses and enrolments from the HET sector for the Academic Years 2011-12 to 2015-16 inclusive, however data for courses and enrolments from the FET sector is only available for 2015-16.

This means that whilst it is possible to provide separate analysis for both the HET and FET sectors we can only provide combined analysis of courses and enrolments for the 2015-16 Academic Year.

1.4.2. Awards Data

Data is available for awards from the HET sector for the periods from 2011 to 2015 with awards data from the FET sector for 2013-2016.

This means that whilst it is possible to provide separate analysis for both the HET and FET sectors we can only provide Combined Analysis of Awards across both the HET and FET sectors for the 2013-15 period.

2. Analysis Categorisations

For the data analysis, categories were identified and assigned to each course, enrolment and award record in the various data tables as follows.

2.1. ISCED Discipline

The International Standard Classification of Education (ISCED) disciplines (1013) Hotel, restaurant and catering and (1015) Travel, tourism and leisure are both referenced in this analysis as all courses relevant to the Hospitality sector as defined above fall into one or other of these ISCED Discipline Classifications

There are two different numbering systems in use across the educational institutes for these ISCED Disciplines with for example both (1013) and (811) being used to refer to the Hotel, restaurant and catering discipline and both (1015) and (812) being used to refer to Travel, tourism and leisure. This is due to a change in the ISCED classification numbering system over the period since 2011.

To avoid any duplication or confusion this analysis will refer to the ISCED disciplines by their current classifications as follows, where appropriate and all records in each data set have been updated to reflect:

- (1013) Hotel, restaurants and catering
- (1015) Travel, tourism and leisure

2.2. Academic Year

Data has been analysed across different date ranges for each data table as follows, based on the data that was received from SOLAS and on the additional data that we were able to source:

- HEA Courses and Enrolments from 2011-2016
- HEA Awards from 2011-2015
- FET Courses and Enrolments from 2015-2016
- FET Awards from 2013-2016
- Combined Courses and Enrolments from 2015-2016
- Combined Awards from 2013-2015

2.3. Occupations

In the support documentation (*see Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020*) clear indication is given as to the specific occupations that are '*most readily associated with the hospitality sector*' as follows:

- Chefs and cooks
- Kitchen and catering assistants
- Waiting staff
- Bar staff

- Restaurant Managers
- Hotel and accommodation managers
- Catering and bar managers

This list of occupations became the objective basis for identifying appropriate courses, enrolments and awards to be included in this analysis.

2.4. Regions

Each course, enrolment and award record in the various data sets used in this analysis has been individually classified by region. Regional information was taken from the regionalskills.ie website to reflect the Network of Regional Skills Fora created as part of the Governments National Skills Strategy.

All regional analysis is based on the following list of 9 regions:

- Dublin
- Mid East
- Mid West
- Midlands
- North East
- North West
- South East
- South West
- West

2.5. Award Levels

National Framework of Qualifications ([NFQ](#)) levels have been added to all records in each of the data tables as appropriate. Special Purpose and Professional Qualification levels have been retained as appropriate. FET courses and enrolments data includes City and Guilds data that has been assigned a comparable NFQ Level.

- Level 2 (Certificate)
- Level 3 (Certificate)
- Level 4 (Certificate)
- Level 5 (Certificate)
- Level 6 (Advanced or Higher Certificate)
- Level 7 (Ord. Degree)
- Level 8 (Higher Degree / Diploma)
- Level 9 (Masters or Post-Grad Diploma)
- Professional Qualification – generally a CPD in butchery skills or cooking skills providing a certificate.
- Special Purpose Award – certificates in specific skills areas like ‘Pastry, tarts and small gateaux’ or ‘Arts of mixology and cocktail making’

3. Data Gathering

Courses and enrolments data was provided by SOLAS that had, in turn, been received from both the HEA and Education and Training Boards (ETBs) and Education and Training Boards Ireland (ETBI). An initial analysis of this data brought up some queries as follows:

3.1. HEA Courses and Enrolments Data

Full time and part time undergraduate and postgraduate and FETAC Certificate and Advanced Certificate combined enrolments in 'Hotel, restaurants and catering' and 'Travel, tourism and leisure' data was provided by the HEA for the Academic Years 2011/2012 through to 2015/2016 inclusive.

The initial data appeared to contain course and enrolments that did not fall within the specific parameters of the Hospitality sector as defined above for this analysis.

A review of the data was carried out, by the HEA, to ensure that only courses and enrolments that could be clearly identified within the parameters of the definition of the Hospitality sector as outlined in the 'Assessments of future skills requirements in the Hospitality Sector in Ireland, 2015-2020' report were included. This led to some courses and enrolments being removed from the initial data set and a new distilled data set was produced. The differences are outlined in the table below.

Academic Year	No of Courses		No of Enrolments	
	<i>Initial Data</i>	<i>Distilled Data</i>	<i>Initial Data</i>	<i>Distilled Data</i>
2011/2012	126	89	5,119	3,864
2012/2013	123	87	5,312	3,850
2013/2014	133	98	5,390	4,036
2014/2015	141	112	5,664	4,675
2015/2016	153	110	5,515	4,296

Table 1: HEA Courses and Enrolments Data changes before/after review to remove non-Hospitality Sector specific records

This distilled list of courses and enrolments was then re-built into a single table and further data added to ensure that each record had a reference to all the analysis categorisations as outlined above.

Data supplied from Shannon College of Hotel Management was subsequently added.

3.2. FET Courses and Enrolments Data

Data sets were provided from the FET sector; however, they were not detailed enough to allow for a proper combined analysis with the data that the HET sector had provided. A series of additional steps were taken to try and collect the detailed data from each ETB.

- Hospitality Audit Feb 17 – this data set was returned to the ETBs seeking clarification and updates specific to the Academic Year 2015-2016.

- Summary of Provision – this data set could not be used as it is too general and does not allow for specific Hospitality sector provision as defined above to be identified.

The experience of this project suggested that no central data bank of courses and enrolments data exists either with the ETBI or with the individual ETBs themselves. With no access to a central data source it was very difficult to source any detailed data within the timeframe of the project.

There would also appear to have been a misunderstanding within the ETBs of the requirements of the analysis and the data that would be needed to achieve that analysis from the outset.

The result is that any analysis that might include FET data can only be provided for the period of 2015-2016.

3.3. HEA Awards Data

No initial awards data was provided by the HEA so a search was conducted that led to the HEA website. Initial data was harvested from this location. However, through further direct consultation with the HEA a specific Excel list with graduate details emerged with awards for the period 2011-2015.

The HEA informed us that no Graduate / Awards data would be available for the Academic Year 2015/2016 until the Autumn of 2017.

The list was converted into a data table and then reduced to remove records that did not fall within the Hospitality Sector as defined above and increased to ensure that each record had a reference to all the analysis categorisations as outlined above.

3.4. FET Awards Data

No Further Education and Training (FET) Awards data was provided so a search was conducted that led to the QQI website. Initial data was harvested from this location through their Statistics and Open Data section.

However, the data available through this source was not consistent in its structure over the years and therefore difficult to work with as a single block for the purposes of this report. Contact was made directly with QQI and after some consultation a single data set of records showing FE Certification Statistics for the period 2013-2016 was delivered by QQI as an Excel list.

The list was converted into a data table and then reduced to remove records that did not fall within the Hospitality Sector as defined above and expanded to ensure that each record had a reference to all the analysis categorisations as outlined above.

4. Data Analysis

Due to the lack of consistency in the date ranges of the Academic Years across the different data sets we have produced a separate analysis of the data across each. This analysis is a sample of the potential information available. As each of the data sets have been compiled into data tables, any combination of the following Data Sample Analysis sets can be produced.

4.1. HEA Courses and Enrolments Data Sample Analysis

HEA data showing the number of courses run and the number of Enrolments that attended those courses is available to us for the academic periods from 2011/12 through to 2015/16.

The data is specific to the following Institutes of Technology and Griffith College as listed below. No data is included from any other private provider, third level or second level school.

- Athlone IT
- Cork IT
- Dublin Institute of Technology
- Dundalk IT
- Galway-Mayo IT
- Griffith College
- IT Tallaght
- IT Tralee
- Letterkenny IT
- Limerick IT
- Waterford IT
- Shannon College of Hotel Management

4.1.1. HEA Courses and Enrolments by ISCED Discipline

Most HEA courses delivered under the definition of Hospitality Sector as set out earlier in this report come under the ISCED Discipline (103) Hotel, restaurants and catering with a minority included under (1015) Travel, tourism and leisure as shown in the table below.

Spread over the period 2011-2016, the table also shows the average number of courses being run and the average number of Enrolments attending those courses per Academic Year (5) within that period.

ISCED Discipline	Total Courses	Total Enrolments	Average Enrolments	Average Courses
(1013) Hotel, restaurants and catering	448	19,010	3,802	89.6
(1015) Travel, tourism and leisure	48	1,711	342.2	9.6
Grand Total	496	20,721	4,144.2	99.2

Table 2: Total number of HEA courses and Enrolments delivered in the Hospitality Sector during the Academic period 2011-2016

4.1.2. HEA Courses and Enrolments by Academic Year with Full Time and Part Time Provision.

Some courses are delivered with provision for Enrolments to attend in either a full time (FT) or in a part time (PT) capacity. It is the way that the Enrolments choose to attend that determines whether a course is a full time or a part time course.

Thus, the figures below will show that, for example, in the Academic Period 2015-2016 a total of 110 courses were delivered of which 76 had enrolments attending in a full-time capacity, 45 in a part time capacity meaning that 11 courses were attended both full time and part time.

Year	All Enrolments	FT Enrolments	PT Enrolments	All Courses	FT Courses	PT Courses	Both FT and PT
2011/2012	3,864	3,179	685	89	64	37	12
2012/2013	3,850	3,232	618	87	63	37	13
2013/2014	4,036	3,275	761	98	65	40	7
2014/2015	4,675	3,995	680	112	87	38	13
2015/2016	4,296	3,541	755	110	76	45	11
Grand Total	20,721	17,222	3,499	496	355	197	56

Table 3: Number of HEA courses and enrolments run with FT and PT provisions

Using the 2011-2012 Academic Year as a base year the table below shows the percentage difference for each year in the number of courses being run and the number of enrolments.

Year	Enrolments	% Diff Enrolments	Courses	% Diff in Courses
2011/2012	3,864		88	
2012/2013	3,850	-0.36%	87	-2.25%
2013/2014	4,036	4.83%	98	12.64%
2014/2015	4,675	15.83%	112	14.29%
2015/2016	4,296	-8.11%	110	-1.79%
Grand Total	20,721		496	

Table 4: % Difference in the number of HEA courses and enrolments across the Academic Period 2011-2016

4.1.3. HEA Courses and Enrolments by Occupation

As previously outlined in 2.3 Occupations that are 'most readily associated with the hospitality sector' have been added to each record in the data tables allowing us to produce information that shows the number of courses and Enrolments attending those courses that can reasonably be assumed to be targeting a specific occupation.

The table below shows that courses targeted at the occupation, Chefs and Cooks are run more often and have a higher number of enrolments on them. At the other end of the scale it shows that courses targeted at Waiting Staff have only begun to be run in the HET sector since the Academic Year 2013-2014 and that even with that only one course was run each year since, with none last year.

Occupation and Academic Year	Total No of Courses	% of Total Courses	Total No of Enrolments	% of Total Enrolments
Chefs and Cooks				
2011/2012	35	7.06%	1797	8.67%
2012/2013	37	7.46%	1821	8.79%

2013/2014	48	9.68%	1922	9.28%
2014/2015	49	9.88%	2141	10.33%
2015/2016	49	9.88%	1950	9.41%
Chefs and Cooks Total	218	43.95%	9631	46.48%
Hotel and Accommodation Managers				
2011/2012	41	8.27%	1718	8.29%
2012/2013	37	7.46%	1743	8.41%
2013/2014	36	7.26%	1827	8.82%
2014/2015	48	9.68%	2214	10.68%
2015/2016	47	9.48%	2059	9.94%
Hotel and Accommodation Managers Total	209	42.14%	9561	46.14%
Catering and Bar Managers				
2011/2012	8	1.61%	269	1.30%
2012/2013	6	1.21%	200	0.97%
2013/2014	5	1.01%	175	0.84%
2014/2015	5	1.01%	167	0.81%
2015/2016	5	1.01%	171	0.83%
Catering and Bar Managers Total	29	5.85%	982	4.74%
Restaurant Managers				
2011/2012	3	0.60%	38	0.18%
2012/2013	5	1.01%	63	0.30%
2013/2014	5	1.01%	69	0.33%
2014/2015	6	1.21%	104	0.50%
2015/2016	6	1.21%	75	0.36%
Restaurant Managers Total	25	5.04%	349	1.68%
Bar staff				
2011/2012	2	0.40%	42	0.20%
2012/2013	2	0.40%	23	0.11%
2013/2014	3	0.60%	27	0.13%
2014/2015	3	0.60%	33	0.16%
2015/2016	3	0.60%	41	0.20%
Bar staff Total	13	2.62%	166	0.80%
Waiting Staff				
2013/2014	1	0.20%	16	0.08%
2014/2015	1	0.20%	16	0.08%
Waiting Staff Total	2	0.40%	32	0.15%
Grand Total	496	100.00%	20,721	100.00%

Table 5: Number of HEA courses and enrolments by 'most readily associated' Occupation

The following table shows the number of courses and enrolments by Academic Year from 2011-2016 for one specific Occupation – Chefs and Cooks along with the % difference each year from the base Academic Year 2011-2012. Similar data can be retrieved quickly and simply from the Pivot table in the *HEA Courses and Enrolments Data 2011-2016 file* using the Occupation filter.

Occupation		Chefs and Cooks			
Year	No of Enrolments	% Diff in No of Enrolments	No of Courses	% Diff in No of Courses	
2011/2012	1797		35		
2012/2013	1821	1.34%	37	5.71%	
2013/2014	1922	5.55%	48	29.73%	
2014/2015	2141	11.39%	49	2.08%	
2015/2016	1950	-8.92%	49	0.00%	
Grand Total	9631		218		

Table 6: HEA Courses and Enrolments for Chefs and Cooks

4.1.4. HEA Courses and Enrolments by Region

As outlined in 2.4 regional information was taken from the regionalskills.ie website to reflect the *Network of Regional Skills Fora* created as part of the Government's National Skills Strategy.

The table below shows an outline of the number of courses and the number of enrolments on those courses across the 9 different regions in the Academic Period 2011-2016.

Region	No of Courses	% of Courses	No of Enrolments	% of Enrolments	Avg. Enrolment
Dublin	138	27.82%	7576	36.56%	55
South West	111	22.38%	3643	17.58%	33
West	80	16.13%	3211	15.50%	40
Midlands	43	8.67%	1269	6.12%	30
South East	39	7.86%	1201	5.80%	31
North West	34	6.85%	684	3.30%	20
Mid West	28	5.65%	2212	10.68%	79
North East	23	4.64%	925	4.46%	40
Grand Total	496	100.00%	20,721	100.00%	42

Table 7: No of HEA courses and enrolments by Region, sorted by highest No of Courses

The data in the above table is sorted by the highest number of courses with Dublin at the top as the biggest provider region with the North-East as the lowest provider. However, if we re-sort the data by the highest average enrolment per course we can see that Mid-West is now top having the highest attendance whilst North West indicates that it has the lowest.

Region	No of Courses	% of Courses	No of Enrolments	% of Enrolments	Avg. Enrolment
Mid West	28	5.65%	2212	10.68%	79
Dublin	138	27.82%	7576	36.56%	55
West	80	16.13%	3211	15.50%	40
North East	23	4.64%	925	4.46%	40
South West	111	22.38%	3643	17.58%	33
South East	39	7.86%	1201	5.80%	31
Midlands	43	8.67%	1269	6.12%	30
North West	34	6.85%	684	3.30%	20
Grand Total	496	100.00%	20,721	100.00%	42

Table 8: No of HEA courses and enrolments by Region, sorted by highest Avg. Enrolment

Note that there are no HEA sector institutions running Hospitality courses in the Mid-East region.

4.1.5. HEA Courses and Enrolments by Award Level

Each record within the HEA Courses and Enrolments data table has been assigned its own appropriate National Framework of Qualifications (NFQ) level as follows:

- Level 5 (Certificate)
- Level 6 (Advanced or Higher Certificate)
- Level 7 (Ord. Degree)
- Level 8 (Higher Degree / Diploma)
- Level 9 (Masters or Post-Grad Diploma)
- Professional Qualification – generally a CPD in butchery skills or cooking skills providing a certificate.
- Special Purpose Award – certificates in specific skills areas like ‘Pastry, tarts and small gateaux’ or ‘Arts of mixology and cocktail making’

NFQ Level	No of Enrolments	No of Courses
Level 5	355	17
Level 6	6912	186
Level 7	6494	151
Level 8	6214	89
Level 9	303	25
Professional Qualification	256	11
Special Purpose Award	187	17
Grand Total	20,721	496

Table 9: HEA Courses and Enrolments by NFQ Level 2011-2016

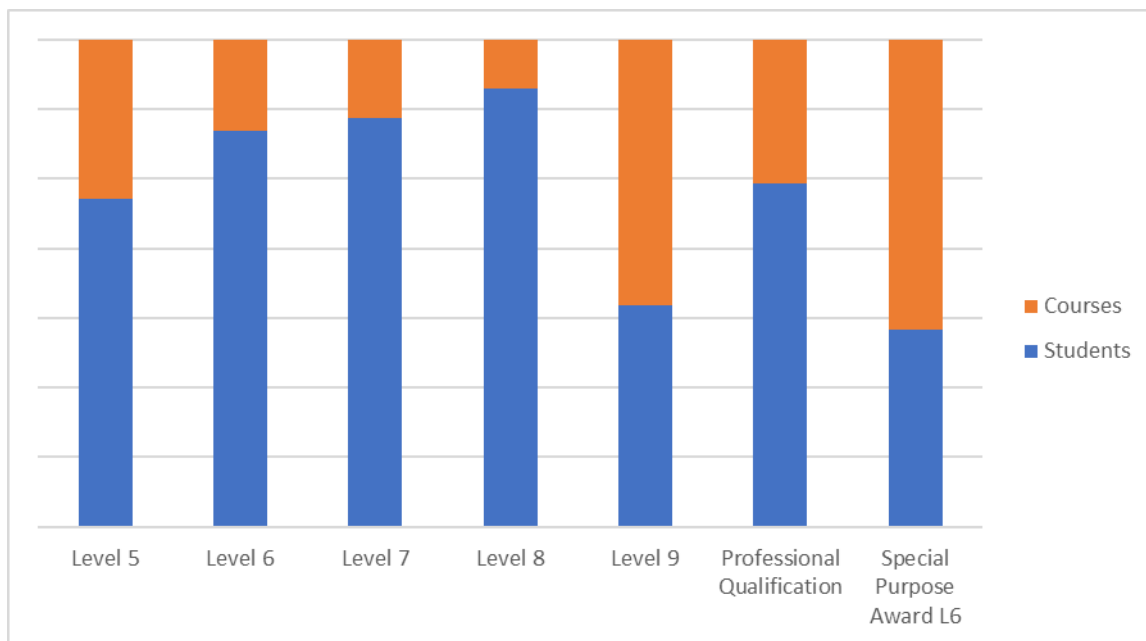


Chart 1: HEA Courses and Enrolments by NFQ Level 2011-2016

4.2. FET Courses and Enrolments Data Sample Analysis

As outlined in 3.2 data analysis for the FET sector is limited to the Academic Year 2015-2016. The records we have are also limited to the list of Education and Training Boards (ETBs) listed below. No private providers or other third or second level schools or colleges are included.

- City of Dublin ETB
- Cork ETB
- Cavan Monaghan ETB
- Dublin Dun Laoghaire ETB
- Donegal ETB
- Galway Roscommon ETB
- Kilkenny Carlow ETB
- Kerry ETB
- Kildare Wicklow ETB
- Limerick Clare ETB
- Louth Meath ETB
- Laois Offaly ETB
- Longford Westmeath ETB
- Mayo Sligo Leitrim ETB
- Tipperary ETB
- Wexford Waterford ETB

4.2.1. FET Courses and Enrolments by ISCED Discipline and Award Class 2015-2016

Most FET courses delivered under the definition of Hospitality Sector as set out earlier in this report come under the ISCED Discipline (103) Hotel, restaurants and catering with a minority included under (1015) Travel, tourism and leisure as shown in the table below.

ISCED Discipline and Award Class	No of Courses	No of Enrolments
Major	70	1,379
Minor	21	391
Special Purpose	4	78
(1013) Hotel, restaurants and catering	95	1,848
Major	2	22
(1015) Travel, tourism and leisure	2	22
Grand Total	97	1,870

Table 10: FET Courses and Enrolments by ISCED and Award Class 2015-2016

4.2.2. FET Courses and Enrolments 2015-2016 with Full Time and Part Time Provision.

Courses in the FET sector are clearly defined as being either Full Time or Part Time – different to the HET sector where a course could have both full time and part time enrolments. Some courses in the FET sector fall under the provision Community Education – following advice and for this report those courses are included as Part time.

Provision	No of Courses	No of Enrolments
2015/2016	97	1,870
FULL TIME	74	1535
PART TIME	23	335
Grand Total	97	1,870

Table 11: FET Courses and enrolments in the defined Hospitality Sector showing Full time and Part Time

4.2.3. FET Courses and Enrolments by Occupation for 2015-2016

As previously outlined in 2.3 Occupations that are ‘most readily associated with the hospitality sector’ have been added to each record in the data tables allowing us to produce information that shows the number of courses and enrolments on those courses that can reasonably be assumed to be targeting a ‘most readily associated’ occupation.

The table below shows that courses targeted at the occupation, Kitchen and Catering Assistants were run most throughout 2015-2016 with the highest enrolments on those courses.

Occupations	No of Courses	% of Total Courses	No of Enrolments	% of Total Enrolments
Kitchen and Catering Assistants	50	51.55%	1,058	56.58%
Chefs and Cooks	27	27.84%	514	27.49%
Hotel and Accommodation Managers	12	12.37%	165	8.82%
Waiting Staff	4	4.12%	72	3.85%
Bar Staff	3	3.09%	44	2.35%
Restaurant Managers	1	1.03%	17	0.91%
Grand Total	97	100.00%	1,870	100.00%

Table 12: FET Courses and Enrolments by Occupation 2015-2016

4.2.4. FET Courses and Enrolments by Region

As outlined in 2.4 regional information was taken from the regionalskills.ie website to reflect the Network of Regional Skills Fora created as part of the Governments National Skills Strategy.

The table below shows an outline of the number of courses and the number of enrolments on those courses across the 9 different regions in the Academic Period 2015-2016 in the FET sector.

Region	No of Courses	% of Total Courses	No of Enrolments	% of Total Enrolments
North East	20	20.62%	411	21.98%
South East	17	17.53%	258	13.80%
South West	15	15.46%	303	16.20%
Dublin	15	15.46%	373	19.95%
Midlands	8	8.25%	191	10.21%
West	7	7.22%	103	5.51%
Mid West	7	7.22%	121	6.47%
Mid East	4	4.12%	62	3.32%
North West	4	4.12%	48	2.57%
Grand Total	97	100.00%	1870	100.00%

Table 13: FET Courses and Enrolments by Region

4.2.5. FET Courses and Enrolments by NFQ Level

Each record within the FET Courses and Enrolments data table has been assigned its own appropriate National Framework of Qualifications (NFQ) level as follows:

- Level 2 (Certificate)
- Level 3 (Certificate)
- Level 4 (Certificate)
- Level 5 (Certificate)
- Level 6 (Advanced or Higher Certificate)

NFQ Levels	No of Enrolments	No of Courses
Level 2	46	2
Level 3	212	14
Level 4	846	43
Level 5	632	32
Level 6	134	6
Grand Total	1870	97

Table 14: FET Courses and Enrolments by NFQ Level 2015-2016

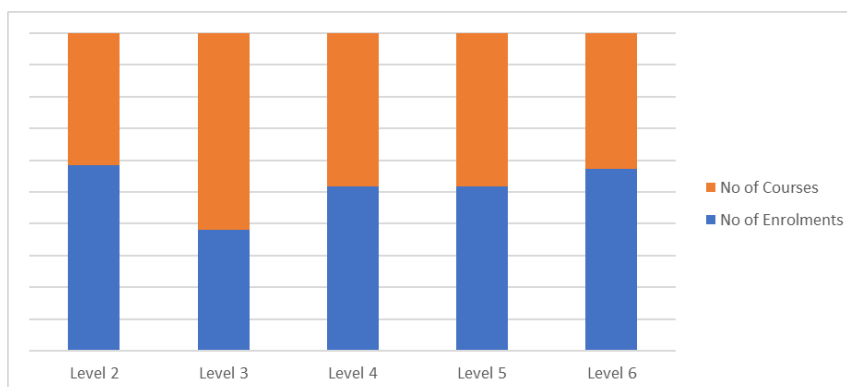


Chart 2: FET Courses and Enrolments by NFQ Level 2015-2016

4.3. HEA Awards Data Sample Analysis

HEA data showing graduates is available for the Academic Years 2010-2015 inclusive. Awards data for the most recent Academic Year 2015-2016 will not be available until the Autumn of 2017.

Awards data in this analysis is available from the institutes listed below. No awards or graduates of private providers or other third or second level schools or colleges are included.

- Athlone IT
- Cork IT
- Dublin Institute of Technology
- Dundalk IT
- Galway-Mayo IT
- IT Tallaght
- IT Tralee
- Letterkenny IT
- Limerick IT
- Waterford IT
- Shannon College of Hotel Management

4.3.1. HEA Awards by Academic Year at each NFQ level 2011-2015

Information is shown below on the number of awards given at each NFQ level across the Institutes of Technology delivering courses that fall within the definition of the Hospitality sector as in 1.1 above along with the % difference from the previous each year from the base year 2011.

Year	Level 6		Level 7		Level 8		Level 9	
	Awards	% Diff	Awards	% Diff	Awards	% Diff	Awards	% Diff
2011	309		241		232		7	
2012	336	8.74%	318	31.95%	260	12.07%	27	285.71%
2013	421	25.30%	349	9.75%	290	11.54%	21	-22.22%
2014	565	34.20%	425	21.78%	313	7.93%	8	-61.90%
2015	569	0.71%	437	2.82%	336	7.35%	16	100.00%
Total	2200		1770		1431		79	

Table 15: HEA Awards Data showing the % difference in awards from the previous Academic Year

4.3.2. HEA Awards by Academic Year for each Occupation 2011-2015

A focus for the Oversight group is in identifying where an increase in graduates may be required across the different specific Occupations specific to the Hospitality sector as defined in 1.1. The table below shows the number of awards issued in each relevant Occupation area as identified.

Occupation	2011	2012	2013	2014	2015	Grand Total
Chefs and Cooks	299	402	472	691	732	2596
Hotel and Accommodation Managers	447	470	531	526	542	2516
Catering and Bar Managers	32	31	47	47	40	197

Occupation	2011	2012	2013	2014	2015	Grand Total
Restaurant Managers	11	27	31	37	34	140
Waiting Staff				10	10	20
Bar Staff		11				11
Grand Total	789	941	1081	1311	1358	5480

Table 16: HEA Awards 2011-2015 to graduates targeting key Hospitality Occupations

4.4. QQI Awards Data Sample Analysis

Data was sourced from QQI (qqi.ie) showing awards for the Academic Years 2013-2016 inclusive.

Awards data in this analysis is available from the ETBs listed below including the listed Institutes of Technology (FETAC and Bórd Fáilte related awards). No awards or graduates of private providers or other third or second level schools or colleges are included.

- Athlone Institute of Technology
- Cavan & Monaghan Education and Training Board
- City of Dublin Education and Training Board
- Cork Education and Training Board
- Cork Institute of Technology
- Donegal Education and Training Board
- Dublin & Dun Laoghaire Education and Training Board
- Dublin Institute of Technology
- Galway & Roscommon Education and Training Board
- Galway-Mayo Institute of Technology
- Institute of Technology, Tallaght
- Institute of Technology, Tralee
- Kerry Education and Training Board
- Kildare & Wicklow Education and Training Board
- Kilkenny & Carlow Education and Training Board
- Laois & Offaly Education and Training Board
- Letterkenny Institute of Technology
- Limerick & Clare Education and Training Board
- Limerick Institute of Technology
- Longford & Westmeath Education and Training Board
- Louth & Meath Education and Training Board
- Mayo Sligo & Leitrim Education and Training Board
- Tipperary Education and Training Board
- Waterford & Wexford Education and Training Board
- Waterford Institute of Technology

4.4.1. QQI Awards by Academic Year at each NFQ level 2011-2015

Information is shown below on the number of awards given at each NFQ level across the FET sector as supplied by QQI for courses that fall within the definition of the Hospitality sector as in 1.1 above along with the % difference from the previous each year from the base year 2013.

Year	Level 3		Level 4		Level 5		Level 6	
	Awards	% Diff	Awards	% Diff	Awards	% Diff	Awards	% Diff
2013	11		8		189		255	
2014	12	9.09%	80	900.00%	189	0.00%	153	-40.00%
2015	20	66.67%	145	81.25%	226	19.58%	143	-6.54%
2016	22	10.00%	106	-26.90%	257	13.72%	144	0.70%
Grand Total	65		339		861		695	

Table 17: QQI Awards Data showing the % difference in awards from the previous Academic Year

4.4.2. QQI Awards by Academic Year for each Occupation 2011-2015

A focus for the Oversight group is in identifying where an increase in graduates may be required across the different specific Occupations specific to the Hospitality sector as defined in 1.1. The table below shows the number of awards issued in each relevant Occupation area as identified in the data supplied.

Occupation	2013	2014	2015	2016	Grand Total
Chefs and Cooks	348	316	348	353	1365
Hotel and Accommodation Managers	109	58	76	81	324
Kitchen and Catering Assistants	6	60	106	85	257
Restaurant Managers			4	10	14
Grand Total	463	434	534	529	1960

Table 18: QQI Awards Data 2013-2016 to graduates targeting key Hospitality Occupations

4.5. Combined Courses and Enrolments Data Analysis – 2015-2016

Data from the FET Courses and Enrolments 2015-2016 data table has been combined with extracted data from the HEA Courses and Enrolments 2011-2016 data table for the Academic Year 2015-2016 into a new data table.

4.5.1. Combined Courses and Enrolments Data Analysis for 2015-2016 by Occupation

A key requirement of this analysis is to identify gaps in the provision of courses that will satisfy the future demand for skills in the Hospitality Sector.

In the 'Assessments of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020' Executive Summary November 2015, Pages 16-19, two scenarios are laid out to illustrate the future demand for skills. These scenarios include the key Occupations most readily associated with the Hospitality Sector as outlined earlier in this report.

- Bar Staff

- Catering and Bar Managers
- Chefs and Cooks
- Hotel and Accommodation Managers
- Kitchen and Catering Assistants
- Restaurant Managers
- Waiting Staff

In Table E.2 of *Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020* p.16 (Source: *Indecon analysis*), it is stated that there are two scenarios for assessing the targets for employment in the Hospitality Sector – one showing a 13.6% growth and the other showing a 6.3% growth.

- In Scenario 1, employment in the Hospitality sector is projected to reach 179,530 jobs by 2020, representing a 13.6% increase from 2014 levels.
- In Scenario 2, employment in the Hospitality sector is projected to reach 167,980 jobs by 2020, representing a 6.3% increase.

The Tables E.3 and E.4 in the ‘Assessments of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020’ report P17-18 (Source: *Indecon analysis*) show a breakdown of projected skills demand requirements over the period 2015-2020 by Expansion and Replacement demand for both the key occupation areas relevant to this report and other occupations.

If we compare this projected skills demand with the available combined courses and enrolments data for the Academic Year 2015-2016 we can see any imbalances between the current course enrolments and the industry requirements.

In the table below the scenarios have been re-built using the data available for each of the occupation types.

- **Scenario 1** and **Scenario 2** show the figures listed in Tables E.3 and E.4 in the ‘Assessments of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020’ report P17-18 (Source: *Indecon analysis*) specific to the relevant hospitality occupations.
- **Per Annum** shows an average per annum requirement dividing the scenario target by the number of years from 2015-2020 (6). For example, in Scenario 1, 16,206 additional Bar Staff will be required across the 6 years from 2015-2020 meaning a per annum requirement of 2,701.
- The **2015-16** column shows the current enrolment numbers in courses specific to that Occupation in that Academic Year per the Combined Courses and Enrolment Data 2015-2016 file.
- The **Diff** column shows the difference between the requirement Per Annum and the actual enrolment in our sample year 2015-2016.

2015-2020 Requirements	Scenario 1	Per Annum	2015/16	Diff	Scenario 2	Per Annum	2015/16	Diff
<i>Bar Staff</i>	16,206	2,701	85	-2,616	14,344	2,391	85	-2,306
<i>Catering and Bar Managers</i>	6,418	1,070	171	-899	5,979	997	171	-826
<i>Chefs and Cooks</i>	14,636	2,439	2,464	25	12,031	2,005	2,464	459

<i>Hotel and Accommodation Managers</i>	4,637	773	2,224	1,451	4,034	672	2,224	1,552
<i>Kitchen and Catering Assistants</i>	12,620	2,103	1,058	-1,045	10,269	1,712	1,058	-654
<i>Restaurant Managers</i>	6,838	1,140	92	-1,048	6,273	1,046	92	-954
<i>Waiting Staff</i>	10,107	1,685	72	-1,613	7,248	1,208	72	-1,136

Table 19: Industry Requirement Projections versus actual enrolment figures 2015-2016

Note that both scenarios are calculated ‘after the consistent annual inflows of student workers into waiters/waitresses, bar and kitchen/catering staff occupations are taken into account’ – ‘Assessments of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020’ report P17.

In the 2015-2016 Academic Year, the combined data shows that there were 6,166 enrolments on a total of 207 courses giving an average of 29.8 students enrolled on each course.

Occupations	No of Enrolments	No of Courses	Average Enrolment Per Course
<i>Bar Staff</i>	85	6	14.2
<i>Catering and Bar Managers</i>	171	5	34.2
<i>Chefs and Cooks</i>	2,464	76	32.4
<i>Hotel and Accommodation Managers</i>	2,224	59	37.7
<i>Kitchen and Catering Assistants</i>	1,058	50	21.2
<i>Restaurant Managers</i>	92	7	13.1
<i>Waiting Staff</i>	72	4	18.0
Grand Total	6,166	207	29.8

Table 20: Combined sector Courses and Enrolment Numbers for 2015-2016

To achieve the projected skills demand requirements as laid out in Table 19 above, annually over the period 2015-2020 the average enrolment per course or the number of courses being offered would need to be dramatically increased for occupations including Bar Staff, Waiting Staff, Restaurant Managers and Kitchen and Catering Assistants.

In both scenarios, the data shows that there is a high enrolment level and an excess of courses for targeted occupations Chefs and Cooks and Hotel and Accommodation Managers whilst Catering and Bar Managers courses have the second highest average enrolment there is a shortage of courses on offer for this occupation.

Occupation	Projected Demand Scenario 1 Diff	Course Shortfall or Excess	Project Demand Scenario 2 Diff	Course Shortfall or Excess
<i>Bar Staff</i>	-2616	-185	-2306	-163
<i>Catering and Bar Managers</i>	-899	-26	-826	-24
<i>Chefs and Cooks</i>	25	1	459	14
<i>Hotel and Accommodation Managers</i>	1451	38	1552	41
<i>Kitchen and Catering Assistants</i>	-1045	-49	-654	-31
<i>Restaurant Managers</i>	-1048	-80	-954	-73
<i>Waiting Staff</i>	-1613	-90	-1136	-63

Table 21: Course Shortfall or Excess based on current Average Enrolment, by Occupation

4.6. Combined Awards Data Analysis – 2013-2015

Data from the FET Awards Data 2013-2016 data table has been combined with data from the HEA Awards Data 2011-2015 into a new data table for the Academic Period 2013-2015:

4.6.1. Combined Awards Data Analysis 2013-2015 Total by Occupation

The total number of awards across both FET and HET sectors for the Academic Period 2013-2015 shows that the highest number of awards are to graduates completing courses that are most readily associated with Chefs and Cooks with the least number of graduates coming from courses most readily associated with Waiting Staff.

Occupation	No of Awards
Chefs and Cooks	2907
Hotel and Accommodation Managers	1842
Kitchen and Catering Assistants	172
Catering and Bar Managers	134
Restaurant Managers	106
Waiting Staff	20
Grand Total	5181

Table 22: Combined Award Numbers by most readily associated Occupation for Academic period 2013-2015

A combined HEA and FET Awards comparison with the number of courses delivered and the number of enrolments cannot be produced as no data for courses and enrolments for the periods prior to 2015-2016 are available from the FET sector.

4.6.2. Combined Awards Data Analysis 2013-2015 Total by Occupation, Academic Year and % Increase/Decrease over the period 2013-2015

The table below looks at the number of awards each year in the Academic Period 2013-2015 for the occupations most readily associated with the Hospitality sector as defined in 1.1 along with a percentage difference in the number of awards each year in the period with 2013 as the base year.

Occupation	Graduate Year	No of Awards	% Diff from Previous Year
Chefs and Cooks	2013	820	
	2014	1007	22.80%
	2015	1080	31.71%
Chefs and Cooks Total		2907	
Hotel and Accommodation Managers	2013	640	
	2014	584	-8.75%
	2015	618	-3.44%
Hotel and Accommodation Managers Total		1842	
Kitchen and Catering Assistants	2013	6	
	2014	60	900.00%
	2015	106	1666.67%
Kitchen and Catering Assistants Total		172	

Catering and Bar Managers	2013	47	
	2014	47	0.00%
	2015	40	-14.89%
Catering and Bar Managers Total		134	
Restaurant Managers	2013	31	
	2014	37	19.35%
	2015	38	22.58%
Restaurant Managers Total		106	
Waiting Staff	2013	0	
	2014	10	1000%
	2015	10	0%
Waiting Staff Total		20	
Grand Total		5181	

Table 23: Combined FET and HEA Awards data for 2013-15

5. Conclusion

This report was commissioned by SOLAS and the HEA on behalf of the Hospitality Skills Oversight Group. It provides a high level of analysis of the data available that shows the alignment of skills provision against identified gaps in the hospitality sector. The reports examines how provision of Hospitality related courses addresses two growth scenarios outlined in the *Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020*, one showing a 13.6% growth rate and the other showing growth at 6.3%.

Under both growth scenarios the projected skills demand contrasted with current course provision for the Academic Year 2015-2016 indicates that in some sectors there is an imbalance between current course enrolments and skills requirements. The analysis shows that there is a high enrolment level and an excess of provision in courses for the occupations of Chefs and Cooks and Hotel and Accommodation Managers. The reports indicates that to achieve the projected skills demand requirements annually over the period 2015-2020 the average enrolment per course or the number of courses being offered needs to increase in the Bar Staff, Waiting Staff, Restaurant Managers and Kitchen and Catering Assistants sectors.

In the 2015-2016 Academic Year, the combined data shows that there were 6,166 enrolments on a total of 207 courses. The total number of awards across both FET and HET sectors for the Academic Period 2013-2015 shows that the highest number of awards is to graduates completing courses that are most readily associated with Chefs and Cooks and provision is concentrated on NFQ level 4, 5 and 6. The report highlights that the majority of skill provision in hospitality related areas in fulltime is at 69%, compared to part-time provision at 31%. Dublin has the highest level of provision in hospitality related courses followed by the South West. The report highlights lower levels of provision in the West, Mid-west, Mid-east and North West regions.

****Data Analysis for this report was commissioned by NM Media on behalf of the Hospitality Skills Oversight Group.***